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OPERATIONS EXHIBITS

1. Management Plans
 - A. Cathedral
 - B. D Street
 - C. Franklin Field
2. New Provisions of Teamster Contract Concerning Personnel Selection
3. John Cochrane Central Maintenance Report
4. Development-Based Work Order Program Draft
5. Orchard Park Team Police Contract
6. Orchard Park Team Police First Report
7. Wasserman Security Models
8. First Draft Tenant Services Plan
9. Vacancy Securing Manual
10. Six Month Goals Schedule
11. Memorandum on Orchard Park Security Door Keys
12. Comparative Chart of Five Month Work Orders

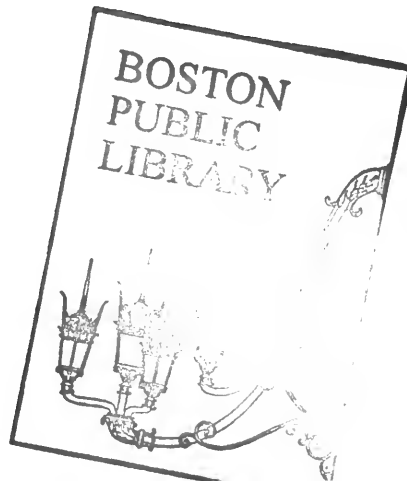




EXHIBIT 1a

CATHEDRAL MANAGEMENT PLANS

MANAGEMENT PLAN

SOUTH END MASS. 2-6

PREPARED BY
ARTHUR FULLER
DISTRICT DIRECTOR
BOSTON HOUSING AUTHORITY
JUNE 30, 1980



Development



Hospital



Police Station



Church



Fire Station



Transit

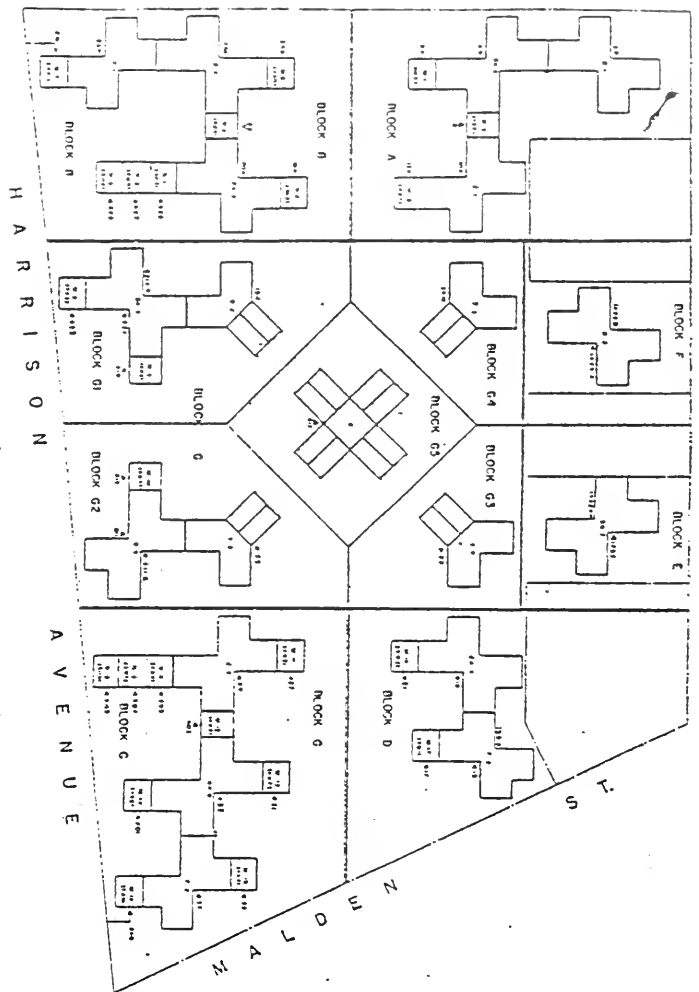


School



Park

SOUTH END



SOUTH END/CATHEDRAL, 2-6

[illegible][illegible][illegible]

STREET AND ADJACENT
IMPROVEMENT PLAN

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As of June 16, 1980, 161 vacancies existed. Their status is as follows:

NON-MOTH BALLED

| <u>Bedroom size</u> | <u>Quantity</u> |
|---------------------|-----------------|
| 1 | 74 |
| 2 | 28 |
| 3 | 18 |
| 4 | 1 |

MOTH BALLED

| <u>Bedroom size</u> | <u>Quantity</u> |
|---------------------|-----------------|
| 1 | 18 |
| 2 | 20 |
| 3 | 2 |

16 East Brookline Street is the only building in this Development which is currently totally vacant. This building was selected to be vacated under the consolidation program. Consolidation was the forerunner of the current stabilization program. The tenants who resided in this building were all transferred to other units of equal bedroom size within the Development. (More details will be given under the stabilization category.) The 40 moth balled units at 16 East Brookline Street are not included in the vacancy statistics. When combined with the 161 scattered sight vacancies, the grand total of vacancies at this Development is 201.

WY A SH I N G I O N

S T.

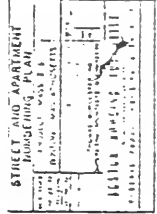
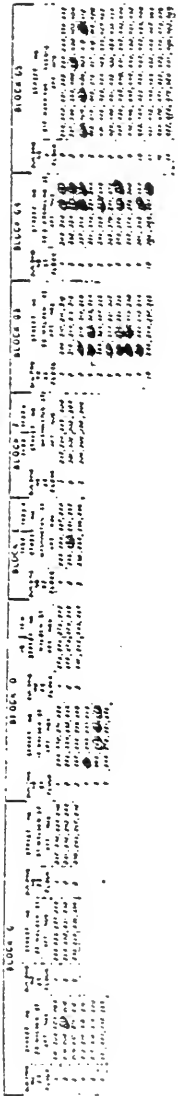
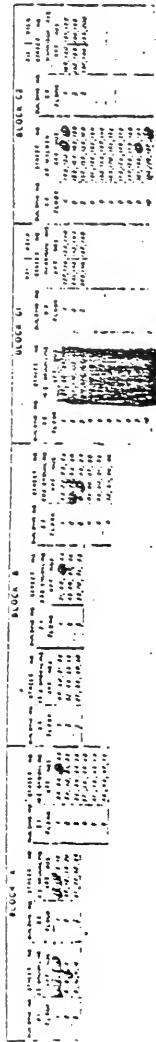
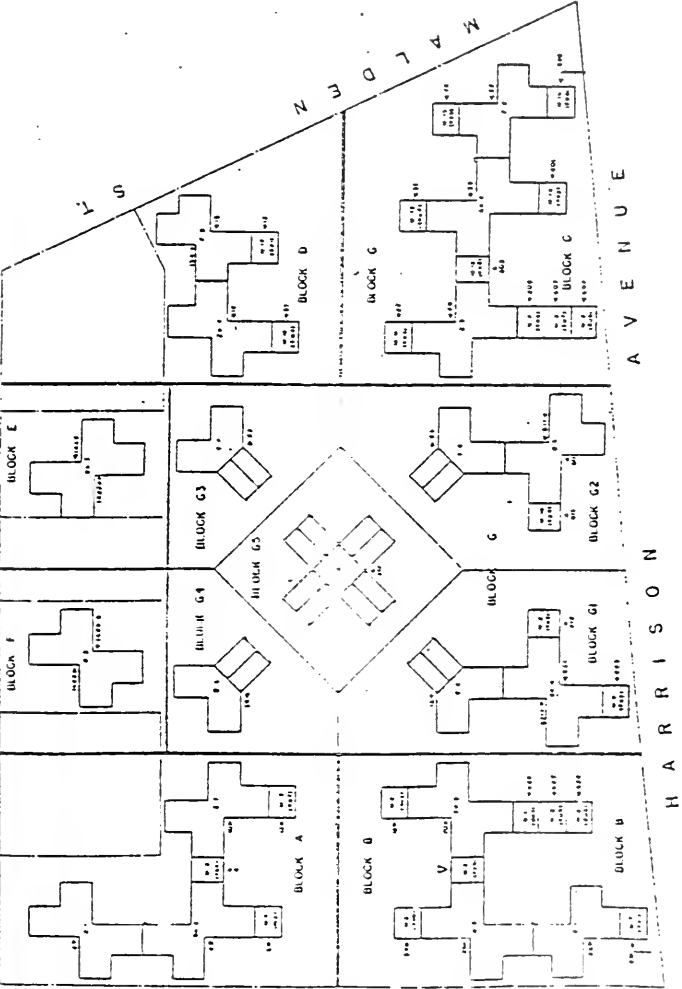
S T.

MO TH CALLED

2310K
201C
30K
4012



SOUTH END/CATHEDRAL, 2-6



| Block | Area | Pop. | Pop. Density | Pop. per Acre | Pop. per Sq. Mile |
|---------|------|------|--------------|---------------|-------------------|
| Block A | 1.00 | 100 | 100 | 100 | 100 |
| Block B | 1.00 | 100 | 100 | 100 | 100 |
| Block C | 1.00 | 100 | 100 | 100 | 100 |
| Block D | 1.00 | 100 | 100 | 100 | 100 |
| Block E | 1.00 | 100 | 100 | 100 | 100 |
| Block F | 1.00 | 100 | 100 | 100 | 100 |
| Block G | 1.00 | 100 | 100 | 100 | 100 |
| Block H | 1.00 | 100 | 100 | 100 | 100 |
| Block I | 1.00 | 100 | 100 | 100 | 100 |
| Block J | 1.00 | 100 | 100 | 100 | 100 |
| Block K | 1.00 | 100 | 100 | 100 | 100 |
| Block L | 1.00 | 100 | 100 | 100 | 100 |
| Block M | 1.00 | 100 | 100 | 100 | 100 |
| Block N | 1.00 | 100 | 100 | 100 | 100 |
| Block O | 1.00 | 100 | 100 | 100 | 100 |
| Block P | 1.00 | 100 | 100 | 100 | 100 |
| Block Q | 1.00 | 100 | 100 | 100 | 100 |
| Block R | 1.00 | 100 | 100 | 100 | 100 |
| Block S | 1.00 | 100 | 100 | 100 | 100 |
| Block T | 1.00 | 100 | 100 | 100 | 100 |
| Block U | 1.00 | 100 | 100 | 100 | 100 |
| Block V | 1.00 | 100 | 100 | 100 | 100 |
| Block W | 1.00 | 100 | 100 | 100 | 100 |
| Block X | 1.00 | 100 | 100 | 100 | 100 |
| Block Y | 1.00 | 100 | 100 | 100 | 100 |
| Block Z | 1.00 | 100 | 100 | 100 | 100 |

Waiting List

The waiting list for this development as of June 16, 1980, Broken down by bedroom size, minority and non-minority status is as follows:

| <u>Bedroom size</u> | <u>Non-minority</u> | <u>Minority</u> | <u>Total</u> |
|---------------------|---------------------|-----------------|-----------------|
| 1 | 1 | 77 | 78 |
| 2 | 2 | 101 | 103 |
| 3 | 1 | 114 | 115 |
| 4 | 1 | 47 | 48 |
| | Total 5 | 339 | Grand Total 334 |

Approved Transfers

As of June, 1980, there are 43 approved transfers for this development. The breakdown by bedroom size is as follows:

| <u>Bedroom size</u> | <u>Quantity</u> |
|---------------------|-----------------|
| 1 | 6 |
| 2 | 3 |
| 3 | 16 |
| 4 | 18 |

Building Systems

This Development was built with four low pressure boilers, designed to supply the Developments heat and hot water. The Development was converted to a forced steam system approximately ten years ago. The steam is centrally supplied by the Boston Edison Company.

The electrical system supplies 30 Amps to a main vault located at 617 Harrison Avenue. From there power is distributed to vaults in other locations throughout the Development. Each apartment has a capacity of 15 Amps.

The steam and electrical expenses for FY 1979 are:

| | |
|------------|------------|
| Steam | 420,624.88 |
| Electrical | 104,742.53 |

The roofs are flat type. New roofs were installed during 1976, and 1977.

Exterior Space

The topography of the grounds are flat. Inadequate parking space exists. The grounds area are currently being used for illegal parking. Most of the grounds are paved with either concrete or tar. Grassy areas do exist in some locations, along Washington Street, and at some locations along Harrison Avenue. Some flooding problems do occur on the paved drive way which circles 617 Harrison Avenue. This is a problem caused by poor catch basin drainage. This problem sometimes occurs after heavy rain storms.

Area Recreational Facilities

The Salvation Army Boys Club is located on the perimeter of the Development of Washington Street, and as such, it is the closest organized recreation facility in the area. The Blackstone Park, and the Blackstone Community School are located across the street from the Development. There are currently no serviceable recreation facilities located in the Development. Other recreational facilities located in the South End which are accessible to the residents of the Development are:

Parks/Playground

| <u>Name</u> | <u>Location</u> |
|----------------------|---------------------------------|
| Peters Playground | Shawmut Ave. and Berkley St. |
| Carter Playground | Columbus Ave. and Camden St. |
| Sullivan Playground | Albany Street |
| Rotch Playground | Albany St. and Randolph St. |
| Titus - Sparrow Park | W. Newton St. and Columbus Ave. |

Swimming Pools (indoors)

| <u>Name</u> | <u>Location</u> |
|--|------------------------|
| Boston City Hospital, South Block Rec. Center | 35 Northhampton Street |
| Blackstone Community School | 50 W. Brookline Street |

City Services

This Development is in close proximity to the various city services. All are within no more than a 15 minute walk. The services in question are:

| <u>Name</u> | <u>Location</u> |
|---|---------------------------------|
| South End Little City Hall | 109 W. Newton Street |
| Boston Police District #4 | 7 Warren Avenue |
| Boston Fire Department | Harrison Ave. and Malden Street |
| Boston Public Library, South End Branch | 685 Tremont Street |
| Various Schools, including the Blackstone Community School | 50 West Brookline Street |
| Boston City Hospital | 818 Harrison Avenue |

Health Care Facilities

An abundance of health care facilities are located in the South End area. All of these facilities are within walking distance. The names and locations of these facilities are:

| <u>Name</u> | <u>Location</u> |
|---|------------------------|
| Solomon Carter Fuller Mental Health Center | 85 East Newton Street |
| South End Community Health Center | 400 Shawmut Avenue |
| Boston University Medical Center | 80 East Concord Street |
| Boston City Hospital | 818 Harrison Avenue |
| University Hospital | 75 East Newton Street |
| Tufts New England Medical Center | 171 Harrison Avenue |

Social Service Agencies

The South End Community abounds with Social Service Agencies that service the needs of both the English and Spanish speaking communities. These agencies are:

| <u>Name</u> | <u>Location</u> |
|-----------------------------------|------------------------------------|
| S. N. A. P. Family Service Center | 554 Columbus Avenue |
| N. A. A. C. P. | 451 Mass. Avenue |
| Ellis Memorial House | 66 Berkley St. and 44 Chandler St. |
| Project Place | 32 Rutland Street |
| Rutland St. Center | 48 Rutland Street |
| Tremont St. Infant Center | 464 Tremont Street |
| U. S. E. S. Harriet Tubman House | 566 Columbus Avenue |
| Coneillio Human Services | 656 Mass. Avenue |
| Cardinal Cushing Center | 1375 Washington Street. |

Churches

Churches of all faiths are located within walking distance of the Development.

Shopping

With the exception of a supermarket located directly across Washington Street, and a couple of smaller stores located in the same block as that supermarket, there is no large scale shopping area available in the South End area. The large scale shopping areas that are nearest to this Development are located in Jamaica Plain, Roxbury, Dorchester, the Back Bay, or Downtown Boston, These areas can all be reached by Public Transportation.

Public Transportation

The Development has easy access to Public Transportation. The orange line Dover Street Station is about a ten minute walk away. Buses also run down Washington Street to Downtown Boston, and to the Prudential Center.



Development



Police Station

(P)

Fire Station

(F)

School

(S)

Hospital

(H)

Church

(C)

Transit

....(T)....

Park

SOUTH END

MANAGEMENT PLAN

I. Staffing

1. Overall Current Staffing and Function

The current staff compliment at the South End Development is twelve.
A break down of these positions are as follows:

MANAGEMENT

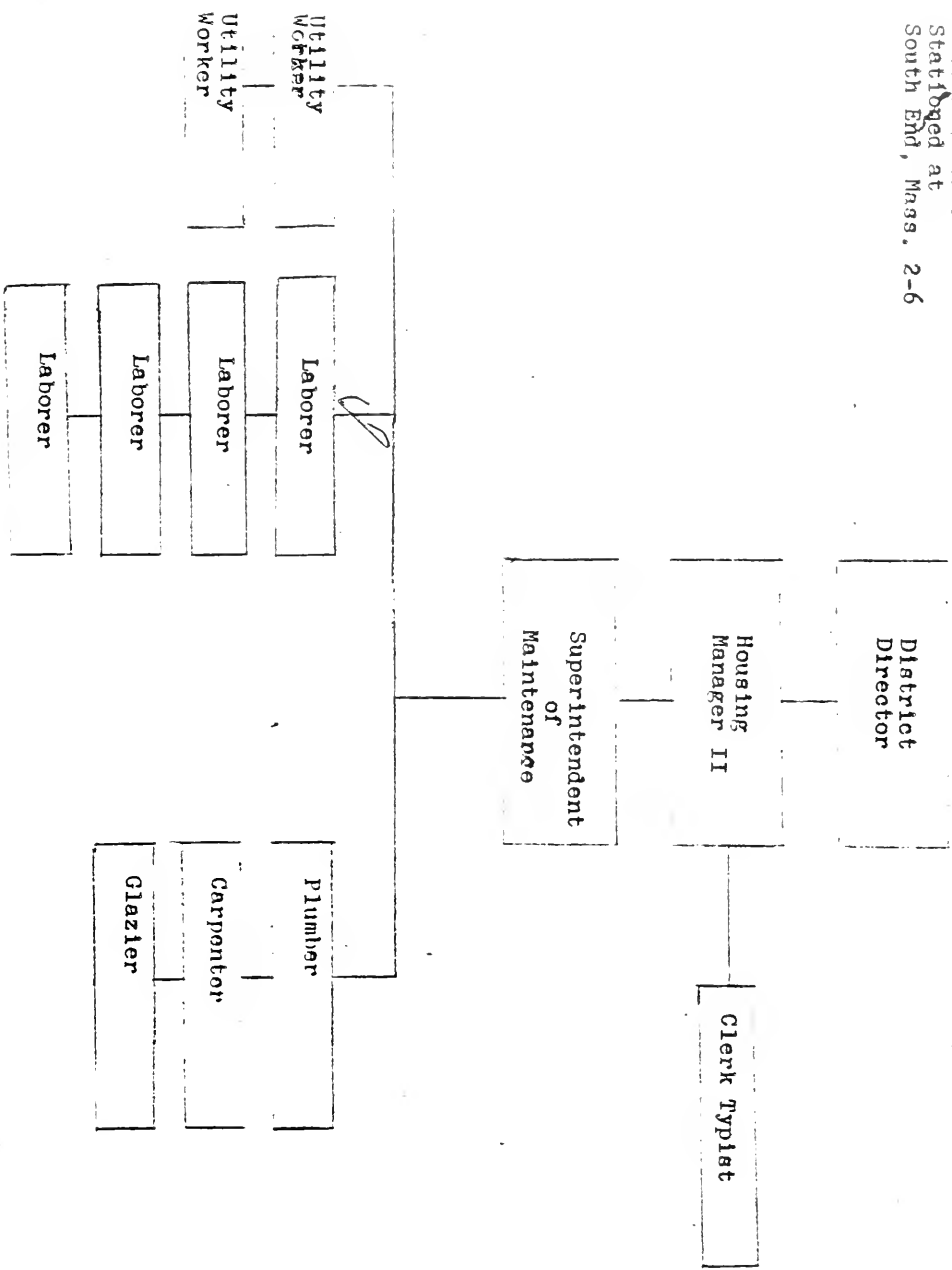
| | |
|--------------------|----|
| Housing Manager II | -1 |
| Clerk Typist | -1 |

MAINTENANCE

| | |
|-------------------------------|----|
| Superintendent of Maintenance | -1 |
| Plumber | -1 |
| Carpenter | -1 |
| Glazier | -1 |
| Laborers | -4 |
| Utility Workers | -2 |

The management office is located at 617 Harrison Avenue. This Building is situated geographically in the center of the Development. The management office occupies the first floor of this 13 story high rise building. The management office consists of a small reception and waiting area. A counter approximately four feet tall separates the waiting area from the inner office area. The inner office area contains a small corridor. The walk-in wall vault occupies the first opening on the left side of the corridor, and the managers office occupies the second opening on the left. On the right side of this corridor are the Mens Room, the Ladies Room, and a vacant office directly across the corridor from the managers office.

Existing Staff
Stationed at
South End, Mass. 2-6



The overall appearance of the management office is clean, well lighted, and orderly. It creates a business like ~~image~~.

Staff Function

Individual job descriptions for each staff position are contained in the Exhibit section. It is my intention to examine each staff category and make recommendations for changes where necessary, and project what the goal of the recommended change should accomplish.

MANAGER

The current manager was given her present position of Housing Manager II, South End Development approximately 13 months ago, in May 1979. Prior to her promotion she had managed a group of Senior Citizen Developments located in the Dorchester, Mattapan, Hyde Park, Roslindale, and West Roxbury areas.

It should be stated at this time that prior to the current manager assuming her position at this Development, the quality of management that had existed at this Development was poor. It is my understanding that for approximately three and one half years prior to May of 1979, Sound Management Practices did not exist in this Development at all.

In a little over a one year period the present manager has gone a long way toward turning the Development around. This is not to say that the number of vacancies in the Development have sharply dropped, or that the total Development arrearage has sharply dropped, or that there is less crime, or vandalism existing now then previously. This is to say that she has an accurate count on her vacancies, this is also to say that the Development is no longer over-run with squatters. Accurate records now exist in the management office, and most important of all the manager is building up the respect of the tenants.

Currently there are some weak areas of the operation, which are caused primarily by the manager being overloaded with work. The most noticeable result of this overload is the delay in the amount of time that is sometimes takes to get information from her. The preparation of the information is delayed at times. This is caused by inexperienced Clerk/Typists.

The manager has a brand new Clerk/Typist working for her. This person has only been on board for two weeks. Prior to that the manager recommended that her previous Clerk/Typist be terminated due to a poor attendance record. Prior to that the manager didn't have a permanent Clerk/Typist. She was without a permanent Clerk/Typist from the day she started in this job, for a period of almost six months, due to the ~~slotted~~ Clerk/Typist being out on compensation for a period of a year and a half. It is obvious that if this manager had the advantage of stepping into this job with an experienced Clerk, she would have made more progress.

The office systems are now workable, but the manager doesn't have total control of the development yet. Additional support is needed for the development. It is hoped that once the stabilization money arrives, this will provide the extra resources to help the manager gain total control of her development.

CLERK/TYPIST

As previously mentioned under the category of manager, the present Clerk/Typist has only been working for the authority for two weeks. Being new to the job it is not feasible to discuss her job performance at this time. The manager is in the early stages of training her.

One asset that the new Clerk/Typist brings to the job is that she is Bilingual. This will prove to be extremely helpful due to the large population of Spanish speaking tenants at this Development, some of which speak very little English, and in some cases no English at all. To my knowledge this office has never had a Bilingual Clerk/Typist before. Development management feels that her presence should enable us to significantly improve communication with Hispanic residents of the Development.

The maintenance area is located in the basement of 611 Harrison Avenue. This area is large and has ample space to store various stock parts, in addition to stoves and refrigerators. This area has been designated for the Development stores area. Some bins and shelves are in place, and grill work is also in place, from a previous era when project stores operated from this location.

The advantage of setting up project stores at this location is that it is set up for this type of operation. There are three main disadvantages:

1. The maintenance area is not in the same building as the management office. The management office has twenty four hour, seven day a week armed security guard protection. The maintenance area does not.
2. Cost of installing an electronic security system, and the cost of installing new steel doors. It must be remembered that once the electronic system has been installed and activated, anyone who enters the premises without following the proper procedure,

will have the Police Department to contend with. I am specifically referring to craftsmen dispatched by E.R.S. who may find it necessary to enter the maintenance area for a tool or part, in order to complete a job.

3. Excessive heat. The main steam pipes from the Edison forced steam system travel through the maintenance area. These pipes are housed at ceiling level, and give off quite a bit of unwanted heat.

Although item #1 and #2 are listed as disadvantages, the cost of installing an electronic security system should prove to be worth the investment because of the additional security they will provide. The final item listed as disadvantageous in item two was craftsmen who come into the development on an overtime basis responding to emergencies who might accidentally trip the system. This need not present a problem if E.R.S. properly notifies all craftsmen about the proper procedure to use when entering the maintenance area at nights and on weekends.

Item #3 will require an engineering study to evaluate the problem, and to determine the best way to rectify it.

SUPERINTENDENT OF MAINTENANCE

The superintendent has been assigned to this Development for approximately four years. He is currently responsible for the direct supervision of his on site staff, which includes four Laborers, two Utility Workers, a Plumber, Carpenter, and Glazier. In addition, he is also responsible for the direct supervision of all district Craftsmen who

rotate into this development on a daily or weekly basis.

The primary responsibility of the Superintendent is to supervise the upkeep of the buildings and grounds. This is accomplished by issuing work orders, based on priorities to the various craftsmen. Coordinating the ordering of stock monitoring craftsmen's job progress, and signing off on completed work orders. He directs monitors, and evaluates the grounds crew in the cleanup of the grounds, basements, and vacant apartments.

The Superintendent is doing a good job, with the manpower and equipment he has at his disposal. Some of the results of his efforts can be observed by looking at the count of outstanding work orders. Some of his efforts cannot be seen. For example grounds clean up has suffered for quite some time due to three Laborers being absent for a prolonged period of time, due to illness. This resulted in a grounds crew staff of only three Laborers reporting to work for a three month period of time. Needless to say the grounds clean up suffered.

In order for the Superintendent to get the job done properly, he will need added support.

CRAFTSMEN AND GROUNDS CREW

This category will identify the individual craft, and whether or not it is stationed at the South End or rotates into this Development. It will also identify the outstanding work orders per craft as of May 31, 1980. The status of the Grounds crew will also be examined.

| <u>CRAFT</u> | <u>STATION</u> | <u>OUTSTANDING WORK ORDERS</u> |
|---------------|----------------|--------------------------------|
| Plumber | South End | 110 |
| Carpenter | South End | 8 |
| Glazier | South End | 0 |
| Painter | Rotates Weekly | 44 |
| Electrician | Rotates Weekly | 9 |
| Plasterer | Rotates Weekly | 68 |
| Steam fitter | Rotates Daily | 2 |
| Appliance man | Rotates Daily | 0 |

LABORERS/UTILITY WORKERS

The grounds crew consists of four Laborers and two Utility Workers. Three of the Laborers have been working at this Development for at least two years. One of these three has been out of work for approximately two months, on Workmens Compensation. The fourth and final Laborer was was promoted from utility worker to Laborer, and recently transferred to this Development, with in the last six weeks.

The two utility workers are both new employees of the authority. Both have not completed their 90 day probationary period.

The grounds crew has improved the image of the grounds to some extent, but the overall appearance of the grounds still leaves much to be desired.

2. Budget

The current annual budget for staff (based on actual annual wages, and salaries paid per job descriptions) projects out as follows:

| | |
|-------------------------------|-------------|
| Housing Manager II | \$18,624.00 |
| Clerk/Typist | 8,598.00 |
| Superintendent of Maintenance | 22,547.00 |

| | | |
|---------------------|--|-------------|
| Plumber | \$10.84 HR x 40 HRS x 52 weeks | \$22,547.20 |
| Carpenter | 9.32 HR x 40 HRS x 52 weeks | 19,385.60 |
| Glazier | 9.88 HR x 40 HRS x 52 weeks | 20,550.40 |
| (4) Laborers | 7.16 HR x 40 HRS x 52 weeks x 4 | 59,571.20 |
| (2) Utility Workers | Approx. 5.66 HR x 40 HRS x 52 weeks x 2 | 23,545.60 |

| | |
|--------------------------|--------------|
| <u>TOTAL STAFF WAGES</u> | \$195,369.00 |
|--------------------------|--------------|

3. Proposed Staff Management

Housing Manager II

(2) Clerk/Typists

Social Service Coordinator

A. FUNCTION

SOCIAL SERVICE COORDINATOR

The function of this position would be to coordinate the delivery of Social Service at the local level. The Social Service Coordinator would be expected to compile a directory of all Social Service Agencies in the South End area, included in this directory would be a list of contact people for each agency, and a brief description of Services offered by each agency. The agencies in question would include, but not be limited to hospitals, churches, clinics, mental health centers, multi-service centers, day care centers, elderly service centers, etc.....

This position would report to the manager, and have office facilities located in the management office. The person occupying this position would be responsible for assessing the needs of tenants who have been identified as needing social service resources. The coordinator would also be responsible for making the referral and following up on the tenants progress. The coordinator will work with managers to screen all cases referred by tenant selection. The coordinator will keep records

on tenants that he/she is working with. Coordinator will formally meet with the manager on a weekly basis to discuss current cases.

CLERK/TYPIST

The function of this position is indicated in the job description. Their would be no deviation from the job description.

B. BUDGET

There is currently no position budgeted for Social Service Coordinator. The basic responsibilities of this job should carry a salary of \$15,000 per year.

The existing yearly budgeted positions for the management section of this Development are:

| | |
|-------------------------------------|-----------------|
| Housing Manager II | \$18,624.00 |
| Clerk/Typist | <u>8,598.00</u> |
| TOTAL | \$27,222.00 |
| Budget for two additional positions | |
| Social Service Coordinator | \$15,000.00 |
| Clerk/Typist | <u>8,598.00</u> |
| TOTAL | \$23,598.00 |

The grand total budget for the management section at the South End Development would be \$50,820.00 annually.

4. Recommended Option for Change

My recommended option for change is that the Development management staff be expanded by two additional staff persons.

5. Goal

Clerk/Typist

The addition of a second Clerk/Typist should speed up the production of the numerous reports that the manager is required to produce

vacant apartments on a scheduled basis.

B. BUDGET

The existing yearly budgeted positions for the maintenance section of this Development are:

| | |
|-------------------------------|--------------|
| Superintendent of Maintenance | \$22,547.00 |
| Plumber | 22,547.20 |
| Carpenter | 19,385.60 |
| Glazier | 20,550.40 |
| (4) Laborers | 59,571.20 |
| (2) Utility Workers | 23,545.60 |
| TOTAL | \$168,147.00 |

Budget For Fourteen Additional Positions

| | |
|---|--------------|
| Stock/Work Order Clerk | \$11,420.00 |
| Plumber | 22,547.20 |
| Carpenter | 19,385.60 |
| Electrician \$10.94 HR x 40 HR week x 52 weeks | 22,755.20 |
| (3) Painters 9.37 HR x " x 52 weeks x 3 | 58,468.80 |
| Plasterer 9.82 HR x " x 52 weeks | 20,425.60 |
| Steamfitter 10.68 HR x " x 52 weeks | 22,214.40 |
| Appliance Man 7.31 HR x " x 52 weeks | 15,204.80 |
| (4) Utility Workers aprox. \$5.66 HR x 40 HR wk. x 52 HR week x 4 | 47,091.20 |
| TOTAL | \$239,512.80 |

The grand total for the maintenance section at the South End would be \$407,659.80 annually.

7. Recommended Option For Change

My recommended option for change is that the maintenance staff be expanded by fourteen additional staff persons.

8. Goal

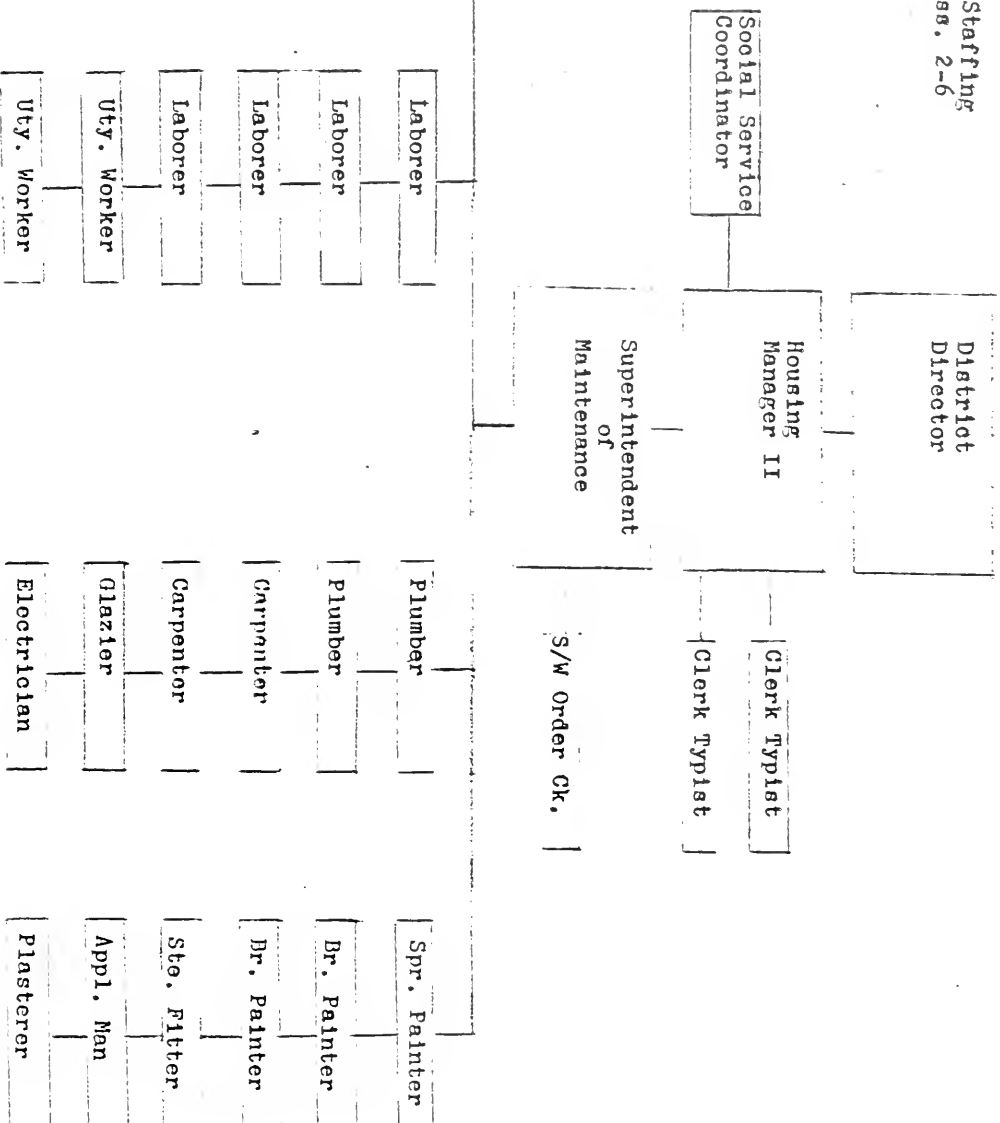
The goal of adding fourteen additional maintenance staff personnel is to achieve a reduction in outstanding work orders, (plumbing 110), additionally to perform Development based rehab on vacant apartments utilizing the crew concept, and to be able to deliver fast service in processing all work orders. (All work orders to be completed within a five working day period, once the old outstanding work orders have been cleaned up.)

The addition of more groundsmen should insure that the grounds are clean at all times, and vacant apartments are cleaned out, inspected, and secured quickly (an apartment should be cleaned out, inspected and secured within 24 hours from the time that the tenant vacates.)

9. Summary

The current staffing at the South End Development is totally inadequate. This Development is much too large to have only two people functioning out of the management office. The maintenance department is struggling to do the job, but it is not being done in an expedient manner. The management and maintenance staff needs to be beefed up if any real progress is to be made in managing the Development in a professional manner.

Proposed Overall Staffing
For South End, Mass. 2-6



EX-100 RLP

1106443020

1106443020
1106443020

70.4
12-JUN-80

STATEMENT OF OPERATING

BOSTON HOUSING AUTHORITY
RECEIPTS AND EXPENDITURES
PROJ 2-6
SOUTH END

YEAR TO DATE

1980

TOTAL

DESCRIPTION

ACCOUNT

CURRENT MONTH

YEAR TO DATE

CONTRACT-OTHER

1106 4430 20

7,760.42

* TOTAL FOR ACCOUNT 4430

88,515.76 *

TOTAL FOR ORDINARY MAINT & OPERATIONS

360,442.66

PROTECTIVE SERVICES

MATERIALS
CONTRACT COSTS

1106 4470 00
1106 4480 00

114,192.19

TOTAL FOR PROTECTIVE SERVICES

114,920.27

GENERAL EXPENSE

WORKMEN'S COMPENSATION
FIRE INSURANCE
PUBLIC LIABILITY
AUTOMOBILE INSURANCE
BONDING INSURANCE

1106 4510 01
1106 4520 02
1106 4530 03
1106 4540 04
1106 4550 05
1106 4560 06

33,564.42
5,011.66
8,304.39
1,011.30
129.84

* TOTAL FOR ACCOUNT 4510

40,033.61 *

TERMINAL LEAVE PAYMENTS
HEALTH INSURANCE
RETIREMENT
UNEMPLOYMENT INSURANCE

1106 4570 00
1106 4580 01
1106 4590 02
1106 4600 03

4,936.70
21,633.37
6,032.72
2,493.59

* TOTAL FOR ACCOUNT 4540

70,746.50 *

COLLECTION LOSSES

1106 4570 00

13,209.38

TOTAL FOR GENERAL EXPENSE

132,891.96

***TOTAL FOR ROUTINE LAPESE

4,936.70

1,589,551.60

EXTRAORDINARY MAINTENANCE

CASUALTY LOSS-NONCAP-NEI

***TOTAL FOR NONROUTINE EXPENSE

.00

.00

EXP.REP

1106461999

PERIOD EMP. REF.

12-JUN-00

STATEMENT OF OPERATING
RECEIPTS AND EXPENDITURES 2ND HAQ. SUPPL. 1990

PAGE 29

DESCRIPTION
*****ACCOUNT
*****CURRENT MONTH
*****YEAR TO DATE

***TOTAL FOR OPERATING EXPENSE

4,936.70

1,509,531.60

REPLACE NONEXPEND MATL

REP NONEXP RANGL'D
REP NONEXP REFRIGERATORS1106 7320 01
1106 7320 02

18,944.90

* TOTAL FOR ACCOUNT 7320

22,076.54 *

TOTAL FOR REPLACE NONEXPEND MATL

22,076.54

PROPERTY GETTERMENT//ADDTN

NONEXPEND EQUIPMENT

1106 7340 30

070.00

TOTAL FOR PROPERTY GETTERMENT//ADDTN

070.00

CASUALTY LOSS-CAPITAL-NET

***TOTAL FOR CAPITAL EXPENDITURES

.00

22,946.54

PRIOR YEAR ADJUSTMENTS

AFFECTING RESID RECEIPTS

1106 6010 00

-3,335.06

TOTAL FOR PRIOR YEAR ADJUSTMENTS

-3,335.06

CONTRIB EARNED-OPER SUBSD

GAIN/LOSS DISP REAL PROP

GAIN/LOSS DISP REAL PROP

1106 6110 00

238,290.91

TOTAL FOR GAIN/LOSS DISP REAL PROP

238,290.91

GAIN/LOSS NONEXP EQUI

PROPERTY OPER EXP-CONTRIA

REPORT EMP-REP
1106/5899970-4
12-JUN-80STATEMENT OF OPERATING
RECEIPTS AND EXPENDITURES
SOUTH END
HOUSTON HOUSING AUTHORITY
FUND 2-6
END 1 UNITS 2ND HAR. SUPPL. 1980

PAGE 50

| DESCRIPTION ***** | ACCOUNT ***** | CURRENT MONTH ***** | YEAR TO DATE ***** |
|------------------------------------|------------------|------------------------|-----------------------|
| PROPERTY OPER EXP-CONTRA | 1106 7590 00 | | -22,946.56 |
| TOTAL FOR PROPERTY OPER EXP-CONTRA | | | -22,946.56 |

***TOTAL FOR NON-OPERATING EXPENSES

.00

215,352.57

**OPERATING EXPENSE SUMMARY

| | | |
|---|----------------------------------|--|
| TOTAL OPERATING AND CAPITAL EXPENSE EXPENSES INCLUDING PRIOR YEAR RECEIPTS RECEIPTS BEFORE CONTRIB SUSID | 4,936.40 4,936.40 4,936.40 | 1,612,494.14 1,612,494.14 1,612,494.14 |
| TOTAL RECEIPTS (OR DEFICIT) | 4,936.40 | 1,287,469.29 |

II. Statement of Operating Receipts and Expenditures

1. Budget

The authority has recently hired two individuals who are scheduled to work with the Managers and District Directors of Developments involved in Stabilization and Pilot Programs. These two staff people will be concentrating on the project based budgeting procedure, which is a necessary tool for sound management.

It is hoped that once the project based budgeting mechanism is in place, a team effort can be utilized (Manager, Task Force Chair Person, and District Director, with Technical Assistance from the Budget Department) to construct the budget.

III. Capital Improvements

1. Current

The following capital improvement items, and monies have been earmarked for this development.

| <u>Work Item</u> | <u>Dollar Amount</u> | <u>Beginning Construction Date</u> |
|---|----------------------|--|
| Elevator Rehab (Phase I) | 225,000 | Jan, 1981 |
| Heating System Renovation (Phase II) | 246,540 | Oct, 1980 |
| Bathroom Modernization (Phase II) | 350,900 | May, 1980 |
| Security Doors | 65,000 | Oct, 1981 |
| Solid Waste Removal | 127,000 | ----- |
| Stabilization (see items below) | 1,299,120 | |
| Site Improvements | 50,000 | Summer 1981 |
| Radiator Traps and Valves | 75,000 | Summer 1981 |
| Bathroom Modernization | 195,000 | Early 1981 |
| Elevator Modernization | 65,000 | Summer 1981 |
| Apartment Rehab | 475,000 | Autumn 1980 |

| | | |
|----------------------------|---------|-------------|
| Hallway Repairs | 100,000 | Winter 1980 |
| Securing Vacant Apartments | 16,000 | Autumn1980 |
| Securing Vacant Buildings | 210,000 | Autumn1980 |
| Relocating Families | 36,000 | Autumn1980 |

GRAND TOTAL \$2,313,560.00

The above programmed money is gravely needed at this Development. The elevators and their parts are old and out moded. These elevators fail to operate consistently, due to age, wear and tear, and due to vandalism. These malfunctioning elevators are a constant source of aggravation to both tenants and management.

The heating system has been partially modernized under phase one. But the Development still suffers from an excessive heat problem, to the degree that some of the apartments feel like green houses, and the manager has the office air conditioning system in operation even during the winter months.

Bathroom modernization is long overdue. This Development receives constant complaints of leaking bathroom faucets. These fixtures cannot be repaired because they are worn out. Modernization particularly as it pertains to bathroom plumbing is in order.

Security doors should be welcomed by all of the tenants. Currently most of the buildings at this Development do not have doors, and for those buildings that do have them, they do not lock. The lack of security doors at this Development encourages undesireables to loiter, and conduct illegal activities in the hallways.

The concept of stabilization is valid for this Development, and the money to back up this concept should keep this Development from regressing further.

2. Recommended Option

ELECTRICAL SYSTEM

It is suggested that the next round of modernization money be programmed to modernize the electrical system. This Development has suffered from power outages on a regular basis. 611 and 611A Harrison Avenue were constantly plagued with this problem. Two authority electricians replaced the panel box for these buildings, and at a latter date two authority electricians also replaced the panel box at 37 Malden Street. These repairs cut down on the chronic complaints that the manager was receiving from these buildings, but lately 611 and 611 A Harrison Avenue have started to act up again. The addresses mentioned above were the ones hit the hardest, but not the only buildings in question. The electrical system is in bad need of updating.

POINTING EXTERIOR WALLS

It is recommended that modernization money be programmed for an engineering study of the brick and mortar of the exterior building walls. Tenants living in various parts of the Development have stated that during heavy rain storms, water sometimes leaks through the walls. Maintenance staff have found water marks on walls in some vacant apartments which indicate that water might be leaking in through the bricks and mortar.

3. Goal

The modernization of the electrical system, and the study of the building exterior walls, (and repair of walls if needed), coupled with the programmed work items listed under "current" category should tighten up most of the major systems at this Development.

The goal is to continue to identify capital improvement items that need modernization, and to find the money to carry out those improvements.

IV. Security

1. Current

This Development is currently serviced by the Excelon Security Service. The authorities contract with this company is for twenty four hour coverage, seven days a week. The shift specifics are:

First Shift - 8:00a.m. - 4:00p.m. (2 men)

Second Shift - 4:00p.m. - 12:00 midnight (2 men)

Third Shift - 12:00 midnight - 8:00a.m. (1 man)

The first and second shift guards patrol the high rise buildings (23 and 25 Malden Street, 14 and 16 East Brookline Street), the third shift guard is confined to 617 Harrison Avenue. The weekly cost for this service is \$1526, which projects to an annual cost of \$79,352.00.

2. Recommended Option For Change

It is recommended that Boston Police be used to protect this Development instead of a private security guard service. The reasons are:

- A. These guards are only contracted to patrol the high rise buildings, which are located in the middle of the Development.
- B. General harrassment of tenants, and illegal drug traffic are florishing at 2 and 4 East Brookline Street, which is on the south western corner of the Development.
- C. Approximately 32% of the entry ways have drug activities taking place in the hallways.
- D. Vandalism of vacant apartments persists. Copper pipe is ripped out, resulting in floods, and at times power outages.
- E. The Development is not a safe place to live.

3. Goal

Make the Development a manageable safe place to live, by ridding it of crime.

V. Social Services

1. Current

The South End area of Boston has over a dozen social service agencies located within its boundaries. This social service delivery system is setup to service all age groups, with programs available for English speaking, as well as non-English speaking persons.

The United South End Settlement Houses, Family Life Center is housed within the Development. This office is located at 37 Malden Street, and is set up to service Development residents of all ages. There is also a Senior Citizens hot lunch program which is located in the Development. A Senior Citizens lounge is located at 617 Harrison Avenue, on the third floor. This lounge also serves as a meeting room for task force related activities.

Residential
and
Commercial

Blackstone
Community
School

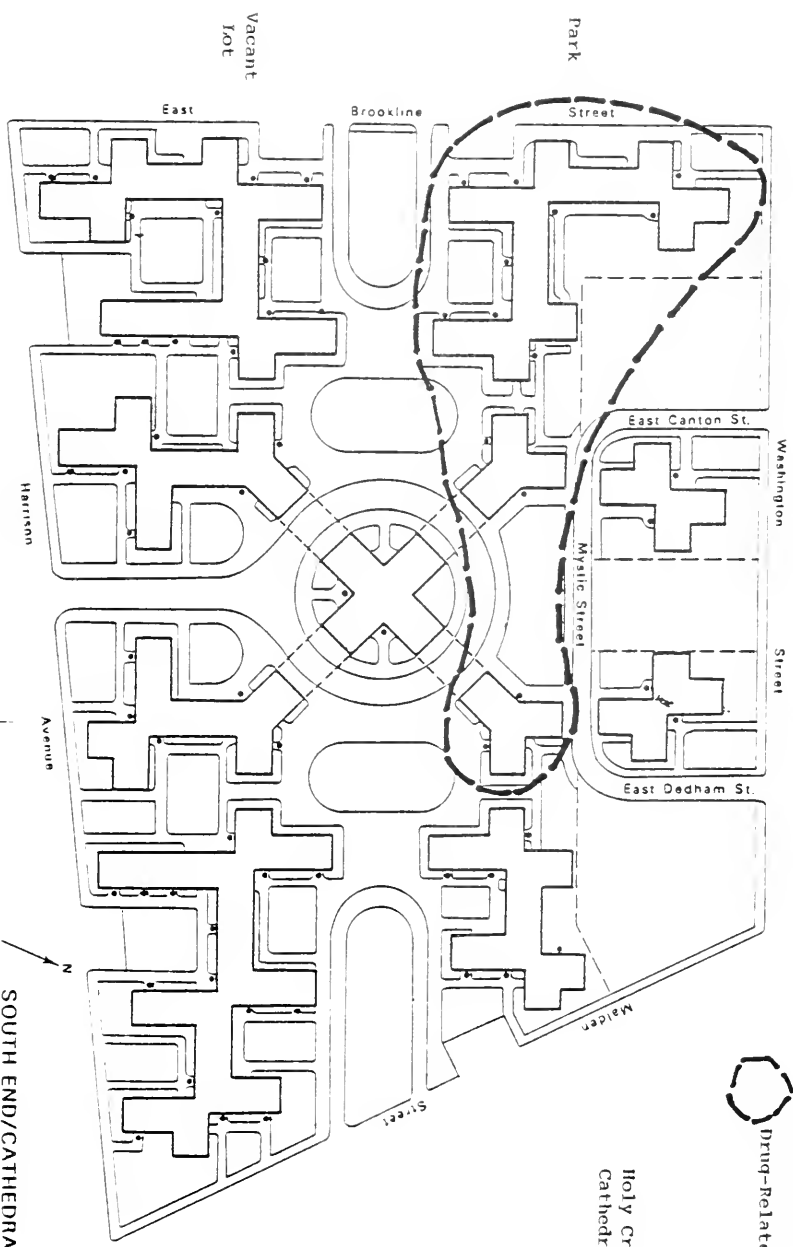
Supermarket

IMPORTANT FEATURES



Drug-Related Activities

Holy Cross
Cathedral



SOUTH END/CATHEDRAL, 2-6

Fire
Station

The tenant services department has assigned a family service worker to District III, this Development is located in District III. The tenant services department also supplies elderly service workers to this development, upon request.

2. Recommended Option For Change

Although there is a Social Service Delivery System in place in the South End area, and there are three social service programs operating out of the Development, and family and elderly service workers are available to this Development, there is no organized effort to channel these services to Development residents. There is a real need to be able to identify tenants social service related needs, and to coordinate the delivery of services to fill those needs.

It is recommended that a social service coordinators position be funded to fill the gap that currently exists. A general description of the function of this position is outlined in the first section of this plan (Roman Numeral #I, item #3, sub item A).

3. Goal

The goal of this position is to enable local management to, coordinate social service input, and delivery to the Development residents.

VI. Stabilization

1. OVERVIEW

The South End Development is one of six Developments which has been selected to undergo the stabilization process. This process is designed to stop the Development from further decay, by earmarking a special allocation of money to concentrate on the immediate short

term needs. The stabilization process is the first step towards restoring this Development to a safe, decent place to live.

The contents of the stabilization process for this Development are:

- Temporarily secure entryways of certain buildings.
- Relocating families from the secured buildings.
- Addressing security, health and safety improvements, vacancy rehabilitation, securing vacant addresses and scattered vacancies, and the marketing of 617 Harrison Avenue.

2. IDENTIFICATION OF ENTRY WAYS TO BE SECURED

Two entry ways have been selected to be temporarily secured.



14 East Brookline Street, and 23 Monsignor Reynolds Way (Malden Street) have been chosen.

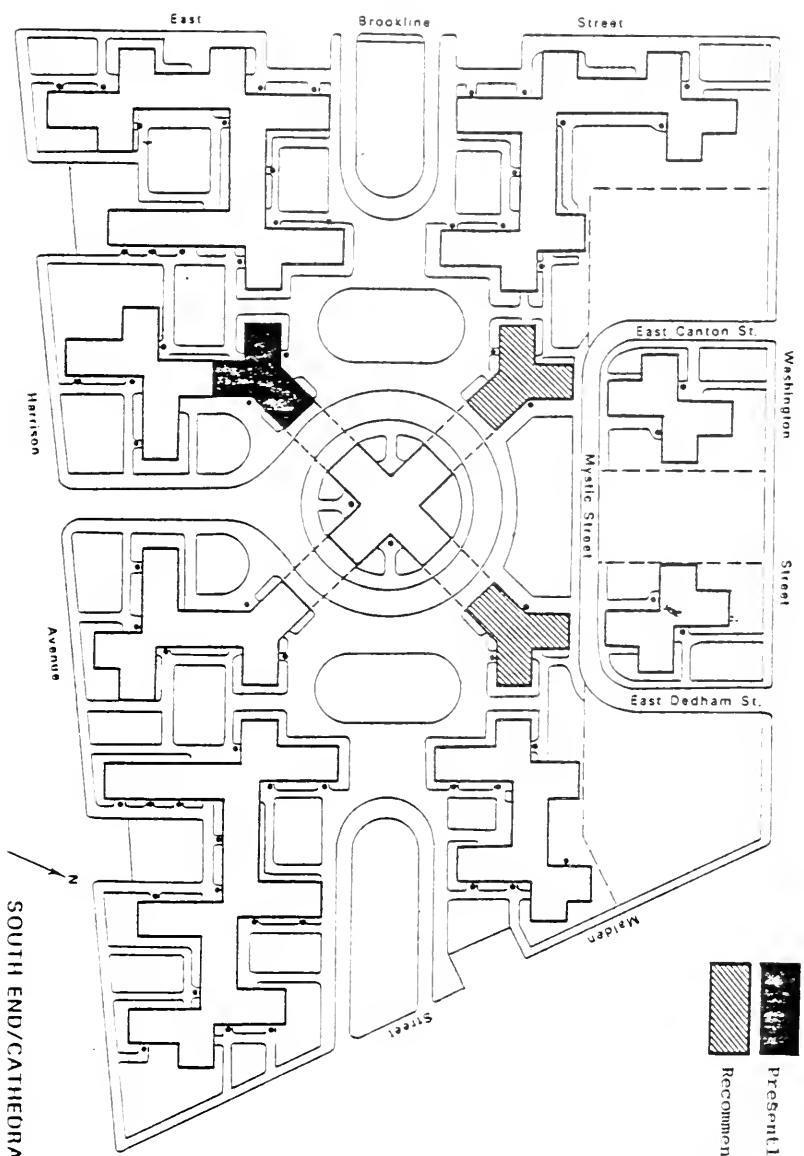
The following criteria was employed to determine which entry ways would be closed.

1. concentrate occupancy of elevator buildings
2. close entry ways which are over 50% vacant
3. avoid closing entry ways on highly visible Development perimeters
4. avoid closing entry ways in sections of the Development which have high occupancy levels

14 East Brookline Street, and 23 Monsignor Reynolds Way are 10 story 40 unit buildings located near the center of the Development, as is 16 East Brookline Street. This building was emptied during December 1979, and January 1980, due to having a 50% vacancy rate, and two vandalized (burned out) elevators. This building has been partially secured. (Front and rear entrance doors, and first and second floor hallway doors) It will need to be properly secured, when 14 East Brookline

PLAN FOR
STABILIZATION AND RE-OCCUPANCY

-  Presently Secured
-  Recommended for Securing



SOUTH END/CATHEDRAL, 2-6

Street, and 23 Monsignor Reynolds Way are being done.

14 East Brookline Street currently has 25 vacancies, and 23 Monsignor Reynolds Way currently has 22 vacancies. Both of these buildings have chronic elevator problems, and they both suffer from heavy drug activity, and are plagued by vandalism.

The closing of these two buildings, coupled with the previous closing of 16 East Brookline Street, will result in three of the four ten story high rise building being closed. 120 units will be secured.

3. RELOCATION PLAN

There is currently a grand total of 33 families which must be relocated. 15 located at 14 East Brookline Street and 18 located at 23 Monsignor Reynolds Way. The statistical breakdown is as follows:

14 East Brookline Street

| <u>occupied units</u> | <u>current bedroom size</u> | <u>relocation need</u> |
|-----------------------|-----------------------------|------------------------|
| 357 | 2 | 2 |
| 358 | 3 | 4 |
| 361 | 1 | 1 |
| 362 | 3 | 3 |
| 363 | 2 | 3 |
| 364 | 2 | 2 |
| 368 | 2 | 2 |
| 370 | 1 | 1 |
| 371 | 2 | 3 |
| 372 | 2 | 2 |
| 378 | 1 | 1 |
| 379 | 2 | 2 |
| 380 | 2 | 3 |
| 384 | 2 | 4 |
| 387 | 2 | 1 |

14 East Brookline Street relocation need by bedroom size TOTAL:

| | | | |
|-------------|-------------|-------------|-------------|
| <u>1 BR</u> | <u>2 BR</u> | <u>3 BR</u> | <u>4 BR</u> |
| 4 | 5 | 4 | 2 |

23 Monsignor Reynolds Way

| <u>occupied units</u> | <u>current bedroom size</u> | <u>relocation need</u> |
|-----------------------|-----------------------------|------------------------|
| 309 | 2 | 2 |
| 310 | 2 | 2 |
| 311 | 1 | 1 |
| 313 | 2 | 3 |
| 314 | 2 | 2 |
| 315 | 1 | 1 |
| 316 | 1 | 1 |
| 318 | 2 | 3 |
| 320 | 3 | 4 |
| 324 | 3 | 3 |
| 325 | 2 | 3 |
| 326 | 2 | 2 |
| 327 | 1 | 3 |
| 330 | 2 | 2 |
| 339 | 1 | 1 |
| 342 | 2 | 2 |
| 345 | 2 | 2 |
| 346 | 2 | 2 |

23 Monsignor Reynolds way relocation need by bedroom size TOTAL:

| | | | |
|------------|------------|------------|------------|
| <u>1BR</u> | <u>2BR</u> | <u>3BR</u> | <u>4BR</u> |
| 4 | 8 | 5 | 1 |

| | | | | |
|------------------------------|-------------|-------------|-------------|-------------|
| Relocation need GRAND TOTAL: | <u>1 BR</u> | <u>2 BR</u> | <u>3 BR</u> | <u>4 BR</u> |
| | 8 | 13 | 9 | 3 |

The following is a list of vacant units by address, apartment number, and bedroom size. Vacant units at 14 East Brookline Street, and 23 Monsignor Reynolds Way are omitted.

1 Bedroom - Total 6

Address

25 Monsignor Reynolds Way #153, 181, 182, 185, 186
617 Harrison Avenue #402

2 Bedroom - Total 9

Address

25 Monsignor Reynolds Way #151, 152, 183, 188
19 Monsignor Reynolds Way #261, 262
29 Monsignor Reynolds Way #208
10 East Brookline Street #46
20 East Brookline Street #77

3 Bedroom - Total 12

Address

2 East Brookline Street #1, 2, 3, 4, 7
4 East Brookline Street #13, 14
10 East Brookline Street #27
20 East Brookline Street #78, 82
19 Monsignor Reynolds Way #266, 268

Currently this Development is short of meeting its relocation needs as follows:

| <u>Short</u> | <u>1 BR</u> | <u>2 BR</u> | <u>3 BR</u> | <u>4 BR</u> |
|--------------|-------------|-------------|-------------|-------------|
| | 2 | 4 | N/A | 3 |

It is recommended that those tenants who are to be relocated, be relocated within this Development. Therefore, it is further recommended that no leasing be allowed for those bedroom size where their is currently a short fall.

4. COMPLIMENTARY IMPROVEMENTS

A. Security

As stated previously in this plan (Roman Numeral IV) private security guards are unable to meet this Developments security needs. In order to clean up crime in this Development, Boston Police must be involved, either in a team police capacity, or in some other capacity that insures their presence on the Development grounds on a permanent basis. Police involvement with this Development is the first order of business. Once this has taken place the manager can proceed to get rid of nuisance families, without the fear of retaliation and tenants will feel more confident in giving the manager information on a bad tenant.

B. Health and Safety Improvements

As previously indicated (Capital improvements, Roman Numeral III, item #1) money has been earmarked to address most of the Health and Safety issues (excluding Security) at this Development. Hallway repairs, elevator and bathroom modernization, heating system repairs, and security doors are all planned for.

The electrical system is the one remaining safety issue that still needs to be addressed.

C. Vacancy Rehabilitation

This activity needs to be coordinated with the actual transfers of the tenants who are to be moved. It is suggested that buildings be selected with multiple units (Example, 25 Monsignor Reynolds Way 153, 181, 182, 185, 186) to be rehabbed, and that they are all worked on at the same time. This will allow the manager to

bring individual buildings up to 100% occupancy immediately. It also allows easier security protection to be provided while these units are in the process of being rehabbed.

The District Director and manager will identify the priority of the units to be rehabbed.

D. Securing Vacant Addresses and Units

14 and 16 East Brookline Street, and 23 Monsignor Reynolds Way will have to be totally secured. All utilities will have to be turned off. Gas pipes should be capped. It is recommended that sheet steel be used to secure the front and rear entrance doors and all the windows on the first and second floors, as well as the windows directly above and below the area where the bridge apartments connect to these buildings. Plywood should be used to board up all other windows. Hallway doors on each floor should be welded shut, and individual apartment doors should be welded shut. All units should be cleaned out and inspected before being welded.

Scattered site vacancies should be cleaned out, inspected, windows boarded, and apartment doors welded shut.

E. Marketing of 617 Harrison Avenue

617 Harrison Avenue is located in the center of the Development. It is a 13 story high rise building which contains the management office, the Senior Citizens lounge, and the private security guard station.

This building is used to house elderly and handicapped persons. 96 units are contained in this building. The breakdown by bedroom size is, 38 one bedroom units, and 8 three bedroom units.

Currently there are 46 vacancies. 42 one bedroom units, and 4 three bedroom units, for a vacancy rate of almost 48%.

All of the vacant units in this building with the exception of two require only minor repairs in order to be occupied.

The feasibility of retaining this building solely for elderly residents must be explored. The advantages and disadvantages of having an elderly building in the middle of a family Development must be considered. It is the feeling of this writer that currently there are no advantages for an elderly person to select 617 Harrison Avenue as a place to reside. There are four B.H.A. elderly Developments located in the South End. These Developments have all the advantages afforded to the elderly, plus they are newer, and safer than 617 Harrison Avenue. Some sort of incentive must be offered to the elderly in order to effectively market this building. (Example, Rent Discount). The possibility of lifting the elderly designation from this building should also be looked into. (Example, individuals with a family composition of one person 50 years of age or older). These options and other options could be considered as examples for marketing the one bedroom units in this Development. The three bedroom units present a different sort of problem. Careful thought must be given to who is to be allowed to live in these units. (Example, these units might be reserved for model tenants).

It is recommended that a marketing committee be formed to look at all the ramifications involved, and to develop a sound strategy for dealing with this building.

With a well planned out strategy, the goal of 100% occupancy can be achieved.

VII. Summary

This Development is in need of support. Additional staff are required in both the management and maintenance sections in order to gain control of the operation of the Development. Additional money must be found in order to expand the staff.

The current security and social service operations are inadequate and must be changed. Both of these operations are key elements in the overall functioning of the Development. Local management must have control over the social service activities, and the Boston Police must deal with the security of the Development, in conjunction with local management.

The project based budgeting process is being eagerly awaited. The manager must have control over, and monitor income and expenditures. This is a basic management function.

Stabilization is the first step in stopping the project from declining. It is the first step in giving the manager control over the Development.

The goal of this plan is to restore control of the Development to the manager.

VIII. Exhibits

SALARY AND GRADE: JOB GRADE #9

MINIMUM: \$15,564

MAXIMUM: \$18,241

GENERAL DESCRIPTION:

This position entails full responsibility for the management of three to six low income Senior Citizen Developments comprising a total of up to 700 units or one or two moderately difficult low income family developments comprising a total of up to 600 dwelling units. Reports directly to District Director. Supervises and directs employees assigned to each development and pursues management objectives in accordance with established rules and regulations and the BHA Managers' Manual. Monthly performance evaluations by District Director.

TYPICAL EXAMPLES OF WORK PERFORMED:

Full range of contact, liaison and negotiations required to accomplish management and maintenance objectives of development(s). Independent responsibility for day-to-day operations, including planning and assigning work and evaluating performance of administrative and maintenance subordinates. Requisitions supplies and services and monitors contractor performance. Implements procedures for rent collection and nuisance eviction. Fosters development of and coordinates with resident organizations. Trains and instructs lower level personnel. Inspects property daily. Conducts safety and preoccupancy inspections of dwelling units. Works with residents and District Director to assemble information required for long range management planning and budgeting. Prepares periodic reports as required. Daily contacts with residents, civic officials and general public to maximize availability of community resources. Attends at least one resident meeting each week. Facilitates publication of semi-monthly resident newsletter. Assembles facts for grievance panels and transfer requests.

MINIMUM QUALIFICATIONS:

Bachelor's degree from an accredited college or university, with specialization in public administration, business or social science. Demonstrated ability to organize thoughts and communicate effectively in oral and written forms. Certification as qualified on-site manager by organization accredited by the U.S. Department of Housing and Urban Development (HUD). Four years experience in housing management, with at least two involving full responsibility for a minimum of 200 low income units.

Demonstrated reliability, ingenuity, initiative, mature judgement, courtesy and tact. General knowledge of community, civic and social resources. Demonstrated familiarity with and respect for diverse cultural backgrounds, and the responsibility of public housing. Demonstrated ability to set goals, plan priorities, and to take required action in difficult circumstances. Sufficient human relations skills to resolve controversial issues arising within scope of delegated authority.

EXPERIENCE:

Exceptional demonstrated proficiency or accomplishment may be acceptable in lieu of a portion of formal education or experience requirements.

POSITION: SUPERINTENDENT OF MAINTENANCE

SALARY AND GRADE: JOB GRADE # 10 MINIMUM \$17,005
MAXIMUM \$19,973

JOB DESCRIPTION:

Under general supervision, to supervise a group of workers engaged in building maintenance activities; and to be responsible for the custody, maintenance and operation of one or more public housing developments; and to perform related work as required.

TYPICAL EXAMPLES OF WORK PERFORMED:

Subject to general assignments and oral and written orders, to review of reports and occasional inspection of work, but with opportunity for consultation with superior on special problems, and with responsibility for maintaining quality and quantity of work.

Supervising a group engaged in a variety of building maintenance and custody activities, such as repairing roofs, plaster, woodwork, masonry and cement work, plumbing and heating installations, electrical installation, cleaning and painting interior and exterior of buildings, maintaining grounds and landscaping and cleaning of buildings and grounds by studying new assignments and pertinent drawings and specifications and inspecting buildings and grounds to determine what work is required; scheduling the work and making assignments to subordinates, redistributing work in accordance with work progress and time limitations; laying out work; advising subordinates on work methods; inspecting work in progress and upon completion; individually keeping records of work done, and preparing reports and recommendations of activities and employees supervised, estimates of cost, and requisitioning materials and supplies.

OTHER EXAMPLES:

As required, and in addition to supervising a variety of building maintenance and custody activities, directing one or more related activities such as unloading, storing and distributing materials, salvaging, sorting and storing lumber and other building materials and equipment.

MINIMUM ENTRANCE QUALIFICATIONS:

Education equivalent to completion of two years in and preferably graduation from a four year trade or vocational high school with courses in building construction or shop work; considerable experience in the care and maintenance of multiple story buildings including the operation and maintenance of equipment therein; considerable knowledge of the operation and maintenance of buildings and related structures and equipment; demonstrated ability to supervise and direct the work of a group engaged in a variety of building maintenance activities; mechanical aptitude and mental alertness; good powers of observation; physically active; tact in dealing with subordinates and building occupants; initiative and resourcefulness in handling difficult building maintenance problems.

EXPERIENCE:

Experience may be substituted for formal education requirements if it is demonstrated that such experience is directly applicable to performance of the stated duties and responsibilities in a satisfactory manner.

POSITION: CLERK-TYPIST

GRADE AND SALARY: JOB GRADE #1 MINIMUM: \$7,616
MAXIMUM: \$9,157

GENERAL DESCRIPTION:

Under supervision, types letters, reports, correspondence, forms, etc. Performs moderately complex clerical and other office duties. When required operates a small telephone communications system.

TYPICAL EXAMPLES OF WORK PERFORMED:

Under supervision, performs general and specific typing assignments. Performs routine typing such as: filling in forms, cards, vouchers and requisitions; cutting stencils; copying longhand drafts, tabular statements, reports, bills and correspondence. Files correspondence and other related material. Proofreads typed material. Performs clerical work involved in the preparation and checking of papers and records, including such activities as analyzing, classifying and filing material of routine nature. Sorts, checks, lists, posts and otherwise prepares records for, or as a check on, various clerical processes as assigned. Performs other miscellaneous routine office work such as preparing and maintaining lists of dates, time records and/or assembling payrolls. Takes telephone calls. Performs other duties as assigned by the immediate supervisor.

MINIMUM QUALIFICATIONS:

Education equivalent to graduation from an accredited four-year high school with courses in typing and commercial subjects is required. Must have recent experience in typing and general office work. Ability to type at a rate of fifty-five (55) words per minute is essential.

EXPERIENCE:

Previous work experience in general office work, preferably in a public agency is desirable. Experience may be substituted for formal educational requirements if it is demonstrated that such experience is directly related to the duties and responsibilities of this position.

SALARY GRADE:

Individuals shall progress from salary grade one (1) to two (2) and from grade two (2) to salary grade three (3) based on merit and the recommendation of the immediate supervisor and Director of Personnel.



POSITION: MAINTENANCE CLERK II

GRADE AND SALARY: JOB GRADE 4

MINIMUM: \$10,723

MAXIMUM: \$12,569

GENERAL DESCRIPTION:

Under the general supervision of an Assistant Manager for Maintenance Services II, or housing manager, the Maintenance Clerk II is responsible for preparing Service Requests, maintaining maintenance and stock control records and performing occasional field inspections for a local management center including under 750 family or senior citizen housing units.

TYPICAL EXAMPLES OF WORK PERFORMED:

Receives and responds to all calls requesting maintenance service, prepares service request forms, maintains individual unit maintenance records, forwards material to Data Processing. Assigns priority on maintenance requests subject to review by supervisor. Files copies of service requests in appropriate areas. Arranges work dates with tenants as required by supervisor. Processes and files all completed work orders.

Maintains perpetual inventory of stock. Issues individual stock items. Requisitions stock to maintain minimum inventory level or to fill special orders. Tracks stock requisitions. Controls access to stock area. Occasionally performs inspections of apartments to identify deficiencies.

Performs such other duties as may be assigned by immediate supervisor.

MINIMUM QUALIFICATIONS:

High school or vocational school certificate or equivalent. Must be able to read and write clearly. Must have knowledge of tools and materials commonly used in building maintenance. Must have patience in dealing with people and be able to maintain courtesy and tact. Must be able to communicate effectively. Must have good judgement, initiative and ingenuity. Must understand the concerns of low income families and respect and appreciate diverse cultural backgrounds. Must have strong organizational and administrative skills.

EXPERIENCE:

Two years work in a maintenance capacity or in a clerical capacity with primary responsibility for responding to tenant inquiries. Prior experience must demonstrate qualities required by Minimum Qualifications.

BOSTON HOUSING AUTHORITY

Job Title: PLUMBER

460

Salary: /hour

DUTIES STATEMENT:

Under general supervision, to maintain and make repairs to any and all mechanical services supplying water, gas and sewage services to the Authority sites and buildings, and to perform the more difficult tasks relating to these services.

TYPICAL EXAMPLES OF WORK PERFORMED:

Subject to general and specific instructions on work assignments, performing such work as: Repairing and replacing water and sewerage systems including water pipes, faucets, valves, joints, traps, drains, soil pipes, toilets and other plumbing accessories and fittings; repairing and installing piping for guard rails; cleaning out traps, drains, toilets, and sewers.

MINIMUM ENTRANCE QUALIFICATIONS:

Education equivalent to completion of eight grades in the elementary schools and preferable graduation from a four year trade or vocational high school; reasonable experience in general building construction or maintenance work; reasonable knowledge of the methods, tools, materials and equipment used; .. and familiarity with the methods, tools, materials and equipment used in the building trades; reasonable skill and ability in doing work in one speciality as indicated by the title of the class; mechanical aptitude; mental alertness; industry and initiative in handling building maintenance problems; willingness to perform any assigned task.

BOSTON HOUSING AUTHORITY

JOB TITLE: CARPENTER

420

SALARY: /hr.

DUTIES STATEMENT:

Under general supervision, to perform the more difficult carpentry work involved in the repair of articles and structures of wood; to perform hand or bench work in a carpentry shop; and to perform related work as required.

TYPICAL EXAMPLES OF WORK PERFORMED:

Working from drawings, blueprints, rough sketches or oral instructions, performing such work as: repairing buildings, such as cutting an opening for a window or door, installing windows frame and sash or fitting and hanging doors; repairing floors, installing interior trimwork; repairing stairways and railings; removing and installing partitions; making, repairing and installing all hardware such as, but not limited to, locks, knobs, hinges, and door checks; as required, assisting other craftsmen in general building maintenance.

MINIMUM ENTRANCE QUALIFICATIONS:

Education equivalent to completion of eight grades in the elementary school and preferably completion of two years in a trade or vocational high school with woodworking courses; reasonable experience, including the completion of an apprenticeship in carpentry construction; reasonable knowledge of carpentry construction, the tools and machines of the trade; familiarity with various kinds of wood, their adaptability and uses, skill in handling tools, materials; ability to work from drawings, blueprints, rough sketches or oral instructions; mechanical aptitude; physical strength; carefulness; initiative in handling unusual carpentry construction work.

BOSTON HOUSING AUTHORITY

Job Title:

GLAZIER

435

Salary: /hr

DUTIES STATEMENT:

Under general supervision, to remove broken glass and cut and install glass lights in windows and doors; to remove and replace window sash; and to perform related work as required.

TYPICAL EXAMPLES OF WORK PERFORMED:

Performing such tasks as: cutting various kinds and thicknesses of glass to specified sizes and shapes; fitting and installing glass where required in wooden or metal frames; setting and fastening glass using glazier's points and other fasteners; cementing panes into sashes or frames with putty and putty knife, calking or glazing gun; removing and replacing defective window sashes; setting up ladders or scaffolding to provide access to windows.

MINIMUM ENTRANCE QUALIFICATIONS:

Education equivalent to completion of eight grades of elementary schools and preferable completion of two years in a trade or vocational high school; reasonable experience in cutting, installing, and fastening glass in various types and sizes of frame; reasonable knowledge of the methods and materials used in cutting and installing glass; reasonable familiarity with the various types and uses of window glass; reasonable skill in using the tools of the trade; carefulness; physical active and strong; industry; willingness to perform any assigned task.

BOSTON HOUSING AUTHORITY

Job Title: ELECTRICIAN

430

Salary: \$ /hour

DUTIES STATEMENT:

Under general supervision to maintain and make repairs to any and all mechanical services supplying electricity services to the Authority sites and buildings, and to perform the more difficult tasks relating to these services.

TYPICAL EXAMPLES OF WORK PERFORMED:

Subject to general and specific instructions on work assignments, performing such work as; Repairing and replacing electrical equipment, conduits and wiring such as, floodlights, interior lighting fixtures, street lighting fixtures, lamp cords, meters, starting equipment and transformers, including: replacing bearings and brushes; cleaning commutator rings; repairing switches, sockets, starters, thermostats and electric clocks; replacing fuses.

MINIMUM ENTRANCE QUALIFICATIONS:

Education equivalent to completion of eight grades in the elementary schools and preferable graduation from a four year trade or vocational high school; reasonable experience in general building construction or maintenance work; reasonable knowledge of the methods, tools, materials and equipment used; and familiarity with the methods, tools, materials and equipment used in the building trades; reasonable skill and ability in doing work in one speciality as indicated by the title of the class; mechanical aptitude; mental alertness; industry and initiative in handling building maintenance problems; willingness to perform any assigned task.

Job Title:

PAINTER

DUTIES STATEMENT:

Under general supervision, to apply protective and decorative coatings to interiors and exteriors of buildings and structures; and to prepare and mix protective and decorative coatings and to perform related work as required.

TYPICAL EXAMPLES OF WORK PERFORMED:

Performing such tasks as: doing interior and exterior painting with a ladder or swing stage; enameling, varnishing and graining woodwork, walls, floors and iron work; mixing paints, sizes, varnishes, enamels, laquers, calcimines, and paint and varnish removers; removing old paint and varnish by scraping, burning, sandpapering, or dissolving and washing; preparing surfaces for painting, staining, varnishing and finishing.

MINIMUM ENTRANCE QUALIFICATIONS:

Education equivalent to completion of eight grades of elementary schools and preferably completion of two years in a trade or vocational high school; reasonable experience in preparing, mixing and applying protective and decorative coatings to interiors and exteriors of building; good color perception; industry and resourcefulness in handling difficult problems in mixing and applying protective and decorative coatings; carefulness; physically active and strong; willingness to perform any assigned task.

STEAMFITTER

DUTIES STATEMENT:

Under general supervision to maintain and make repairs to any and all mechanical services supplying the heat and power services to the Authority sites and buildings, and to perform the more difficult tasks relating to these services.

TYPICAL EXAMPLES OF WORK PERFORMED:

Subject to general and specific instructions on work assignments, performing such work as: Inspecting and maintaining and altering heating equipment in buildings, garages, shops and similar structures; performing such work as inspecting, repairing, installing or replacing steam pipes, stop valves, reducing valves, traps, radiators, gauges and other accessories and fittings; grinding and repacking valves; repacking pumps and replacing worn pipe line gaskets; making up and installing pipe support brackets; making repairs to pipes, valves, fittings and other auxiliaries on steam and hot water boilers; covering steam or hot water pipes with insulating material.

MINIMUM ENTRANCE QUALIFICATIONS:

Education equivalent to completion of eight grades in the elementary schools and preferably graduation from a four year trade or vocational high school; reasonable experience in general building construction or maintenance work; reasonable knowledge of the methods, tools, materials and equipment used; and familiarity with the methods, tools, materials and equipment used in the building trades; reasonable skill and ability in doing work in one specialty as indicated by the title of the class; mechanical aptitude; mental alertness; industry and initiative in handling building maintenance problems; willingness to perform any assigned task.

PLASTERER

DUTIES STATEMENT:

Under general supervision, to finish walls and other surfaces with lime, cement or sand plasters and to perform related work as required.

TYPICAL EXAMPLES OF WORK PERFORMED:

Performing work, such as: patching holes and cracks in plaster; tearing down loose plaster; mixing, preparing and applying new plaster to ceilings and walls.

MINIMUM ENTRANCE QUALIFICATIONS:

Education equivalent to completion of eight grades in the elementary schools and preferably graduation from a four year trade or vocational high school; reasonable experience in general building construction or maintenance work; reasonable knowledge of the methods, tools, materials and equipment used, and familiarity with the methods, tools, materials and equipment used in the building trades; reasonable skill and ability in doing work in one specialty as indicated by the title of the class; mechanical aptitude; mental alertness; industry and initiative in handling building maintenance problems; willingness to perform any assigned task.

POSITION: APPLIANCE MAN

SALARY: \$6.95 PER HOUR

JOB DESCRIPTION:

Under general supervision inspects, maintains and repairs gas or electric ranges and refrigerators and performs related work as required.

TYPICAL EXAMPLES OF WORK PERFORMED:

INSPECT appliance units as directed, to determine the type and extent of work required. DETERMINE when a unit must be replaced and, whether tenant caused damage. PREPARE vacant apartments for leasing by cleaning, repairing and restoring appliances. REPAIR OR REPLACE broken or malfunctioning parts as required to provide proper service. CONNECT OR DISCONNECT fixtures when required. REPORT equipment which requires replacement or outside service. RECORD and REPORT in prescribed manner, the details of all work done on individual appliance. ADJUST thermostats, pilots, burners, controls, etc., on request, to assure normal operation. PERFORM such other related work as may be required from time to time.

MINIMUM ENTRANCE QUALIFICATIONS:

Education equivalent to completion of eight grades and preferably graduation from a four year trade or vocational high school: knowledge and familiarity with the tools, methods, materials and equipment required for maintenance of gas and electric appliances.

EXPERIENCE:

Experience may be substituted for formal education requirements if it is demonstrated that such experience is directly applicable to performance of the stated duties and responsibilities in a satisfactory manner. Should have four (4) years experience as an appliance man and the demonstrated ability to perform the work well.



BOSTON HOUSING AUTHORITY

JOB DESCRIPTION: LABORER

RATE: AS DETERMINED BY THE COMMISSIONER OF LABOR
AND INDUSTRIES

GENERAL DESCRIPTION:

Under supervision, the laborer will be required to perform diversified manual tasks, often requiring considerable physical strength and endurance. Work involves a variety of tasks not requiring a journeyman's knowledge. Individual may be assigned individually or as a member of a work crew.

TYPICAL EXAMPLES OF WORK PERFORMED:

Keeps development offices, community spaces, interior public spaces and grounds in an orderly condition by cleaning, washing, shoveling, sweeping, raking and mopping. Loads and unloads trucks with furniture, appliances, dirt, sand, salt and other equipment and materials. Maintains incinerators - lights and cleans incinerators and puts debris into barrels and places barrels at curb for regular collections. Cuts grass, prepares area for landscaping, spreads loam, seed and fertilizers prunes shrubbery and trees. Does pick and shovel work in grading and patching and digging up bituminous, concrete and exposing water and sewer lines. Inspects buildings and hallways for damage and replacement of light bulbs. Reports acts of vandals to immediate supervisor. Cleans and sweeps vacant apartments. Shall perform extermination of insects and mice in conformance with proper safety standards. May perform cleaning and minor repairs to stoves and refrigerators. Operates truck, snowplow, power and handmower, mechanical sweeper, jack hammer, and as designated heavier equipment such as bombadiers, sweepers etc. May be assigned to relief work in the maintenance room, for example clerk work or boiler room work. Makes minor repairs to door closers, door handles, fences, stair railings, radiator covers etc. Assists Journeyman and Journeymen Mechanics when required. Assists in program of preventative maintenance and prepares work slips for completed work. Performs other related work as assigned by the Supervisor.

MINIMUM ENTRANCE QUALIFICATIONS:

Graduation from a standard high school or trade school preferred. Some knowledge of one or more trades desirable. Ability to understand and follow instructions. Should have skill in the use of hand tools and moving equipment as described under typical examples of work performed. Driver's license preferred and in some instances required.

EXPERIENCE:

At least two years of experience in heavy manual work and in the use of hand tools is desirable. Experience may be substituted for formal education if it is demonstrated that such experience is applicable to the performance of the stated duties and responsibilities of this position.

BOSTON HOUSING AUTHORITY

JOB DESCRIPTION:

Utility Worker
HOUSING GROUNDSMAN/PORTER

RATE:

NEGOTIATED RATE

GENERAL DESCRIPTION:

Under close supervision, the Housing Groundsman/Porter will be required to perform manual work of a routine nature requiring physical strength and endurance. This individual may work alone or as a member of a work crew. Individuals will be assigned to work in Federal developments.

TYPICAL EXAMPLES OF WORK PERFORMED:

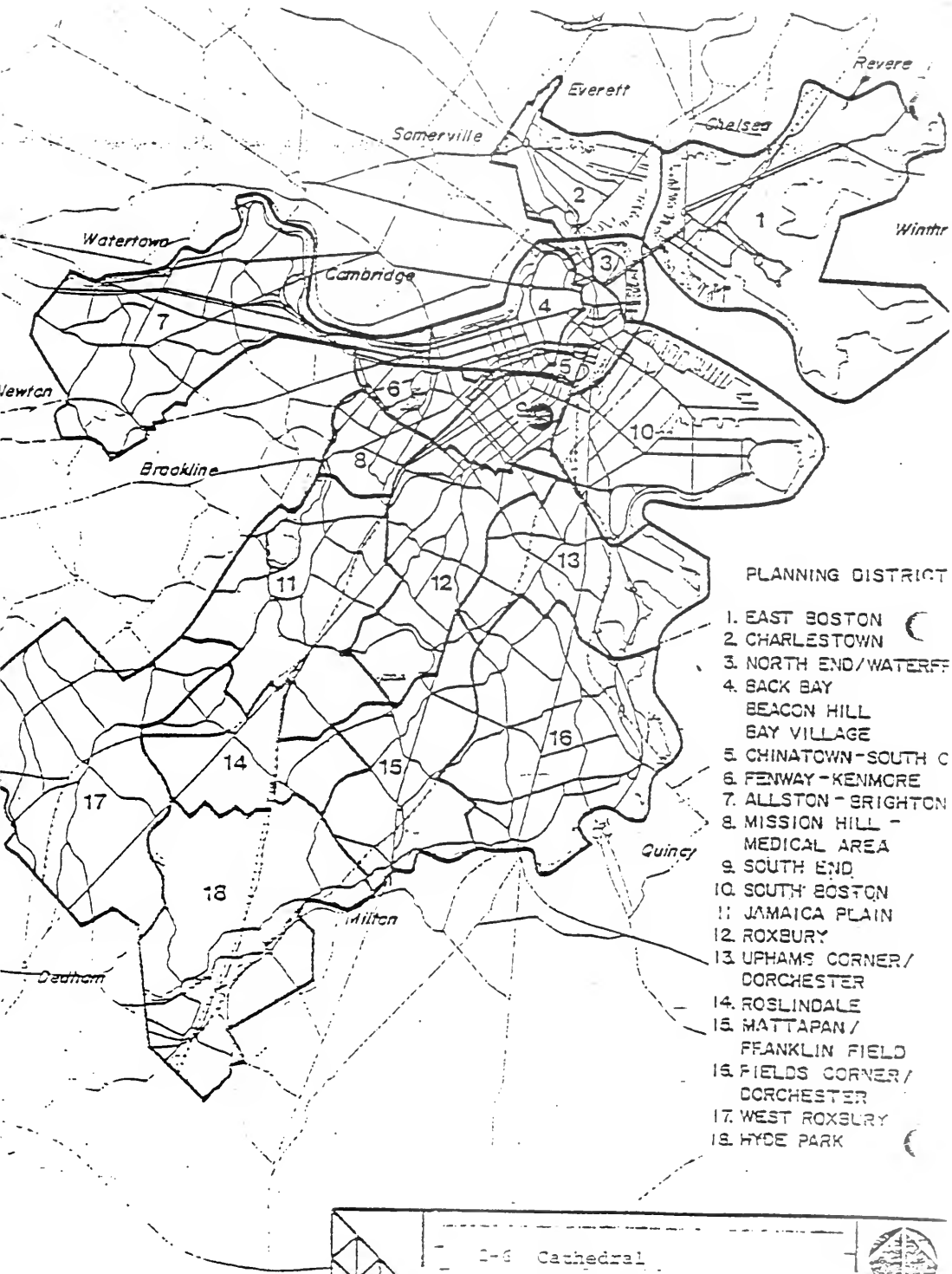
Shall keep development offices, community spaces, interior public spaces and grounds in an orderly condition by cleaning, washing, shoveling, sweeping, raking and mopping. Will gather and dispose of trash and rubbish. Cleans hallways, elevators and washes interior walls. Maintains incinerators - lights and removes burned residue and places it in barrels. Inspects buildings and hallways for damage and replacement of light bulbs. Reports acts of vandals to immediate supervisor. Cleans and sweeps vacant apartments. Checks cellars and crawl spaces. Maintains grounds by performing combination of the following tasks: cuts lawns, trims and edges around walks, walls, fences etc., prunes shrubs, hedges, trees etc., fertilizes plants and lawns, plants trees and shrubs. Shovels snow and spreads sand and salt as required. Assists journeymen, cleans out apartments, removes furniture, carries materials, loads and unloads trucks. May use such equipment as power mower, snowblower, lawn roller, pruner, hedge trimmer, wheelbarrow, saw, post hole digger, etc. May operate a truck when required. Performs other duties as assigned by the immediate supervisor.

MINIMUM ENTRANCE QUALIFICATIONS:

Graduation from a standard high school or trade school preferred. Ability to understand and follow instructions. Knowledge and skill in the operation of hand tools. Driver's license preferred.

EXPERIENCE:

Some experience in manual work and in the use of hand tools. Experience may be substituted for formal education if it is demonstrated that such experience is applicable to the performance of the stated duties and responsibilities of this position.



STATEMENT OF OBJECTIVES

THE OBJECTIVES OF THIS PLAN ARE TO:

1. Identify the current conditions pertaining to:
 - A. Managerial Functions
 - B. Maintenance/Mechanical Functions
 - C. Social Functions
2. Recommend options for change
3. Project the results that these changes could achieve, to transform this development into a decent place to live..

EXHIBIT 1b

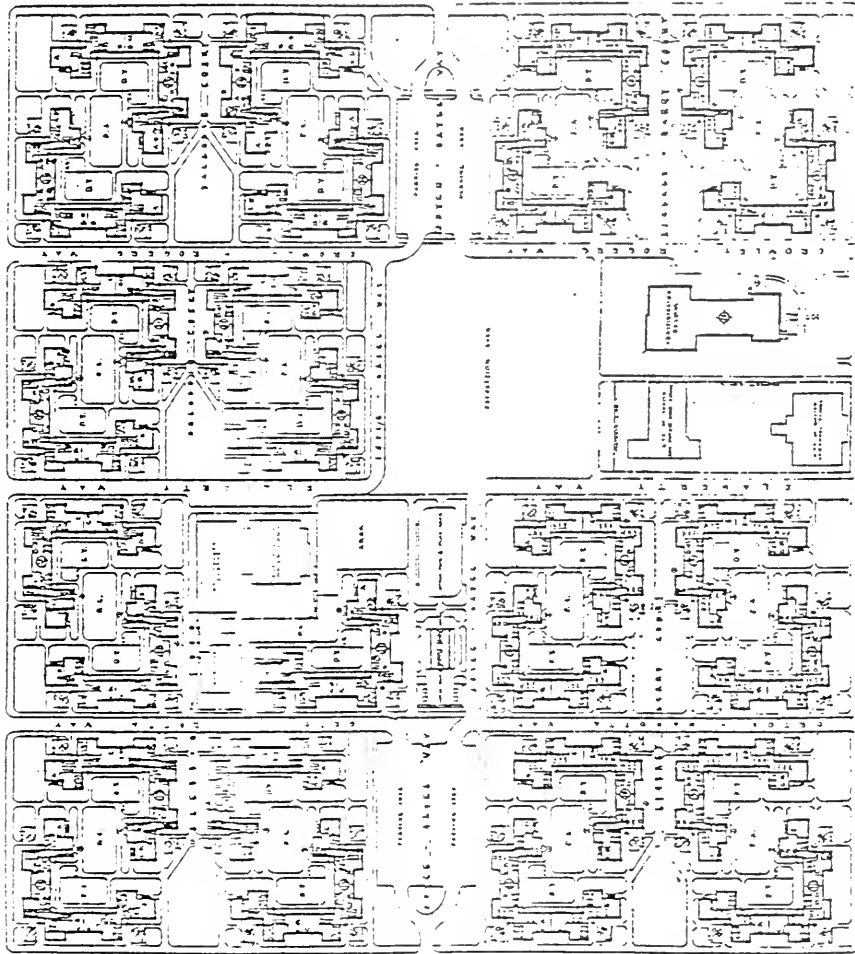
D STREET MANAGEMENT PLANS

File

MANAGEMENT PLAN
AND
MAINTENANCE SUPPORT PROPOSAL
FOR
WEST BROADWAY DEVELOPMENT
(BOSTON-200-1)

Prepared and Submitted by:
Robert McNabb, District Director
Boston Housing Authority

D STREET



VETERANS HOUSING DEVELOPMENT BOSTON-200-1

SOUTH BOSTON DISTRICT

M. A. Dyer Company Architects

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1. OFFICIAL RECORDING
2. PLANNING BOARD
3. CITY ENGINEER
4. CITY COMMISSIONER
5. CITY CLERK
6. CITY ATTORNEY
7. CITY MANAGER
8. CITY BOARD OF ALDERMEN
9. CITY BOARD OF SELECTMEN
10. CITY BOARD OF SUPERVISORS
11. CITY BOARD OF HEALTH
12. CITY BOARD OF EDUCATION
13. CITY BOARD OF FIRE ALARMS
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Developmental, Managerial and Concept

Director Managers

General Housing Manager

Housing Management Dept.

Chief Engineer

Chief Engineer

Chief Engineer

Chief Engineer

Chief Engineer

Chief Engineer

Chief Engineer

Chief Engineer

Chief Engineer

Chief Engineer

Chief Engineer

Chief Engineer

(15) CHIEFS AND PRINCIPALS

CHIEFS PRINCIPALS

CHIEFS PRINCIPALS

CHIEFS PRINCIPALS

(7) PRINCIPALS

(13) CHIEFS

I DEVELOPMENT PROFILE

Development Description

1. The West Broadway Development, also known as the "D" Street Development, is located in South Boston, Massachusetts, Suffolk County, bounded by "B" Street, West Broadway and West Seventh Street. The State-owned, Boston Housing Authority managed development encompasses approximately twenty-five (25) acres of land.

There are twenty-seven (27) three-story, walk-up buildings, which are separate-winged structures containing thirty-six (36) units per building, or twelve (12) units per wing. Each building has a full basement and each structure is of Class A brick veneer construction.

Built in 1949, the original unit composition contained nine hundred seventy-two (972) apartments. The present unit composition is nine hundred twenty five (925). This change in composition is directly related to past breakthroughs.

To illustrate this change in configuration, a detail of bedroom adjustments is as follows:

1. Twenty-three (23) 1 Br's are incorporated as breakthroughs.
2. Seventeen (17) 2 Br's are incorporated as breakthroughs.
3. Sixteen (16) 3 Br's are incorporated as breakthroughs.
4. Ten (10) 4 Br's are incorporated as breakthroughs.
5. Nineteen (19) 5 Br's are created from breakthroughs.
6. Thirteen (13) 6 Br's are created from breakthroughs.
7. One (1) 3 Br. that is a welfare office.
8. Six (6) 2 Br's and Six (6) 3 Br's which the West Broadway Multi-Service Center operates.
9. Two (2) 2 Br's operated by the Sisters of Labour.

Development Description (Con't).

The current population is approximately twenty-four hundred (2400) or approximately 3.5 people per household. Of this total approximately one-hundred ten (110) are elderly citizens.

The heating system was converted in 1974 to Boston Edison steam, produced off-site. The system is housed in the Condon School, which is located within the Development. The steam enters the Condon School by pipe and is metered from that point and distributed through the Development.

The distribution is a loop system, which means the condensate is returned to the school, cooled and dumped into the sanitary sewer. There is one return pump servicing two buildings. These pumps are located in buildings #1, 2, 5, 8, 9, 12, 13, 17, 20, 21, 25, 26, and 27. At least once a year these pumps should be addressed by a routine overhaul. Presently, they are not. (See Maintenance Requirements, Page 56).

The domestic hot water is provided by two (2) tanks, each holding 1,600 gallons of water, and is located in the utility room in the basement of the Condon School.

One basic problem at the West Broadway development is the lack of Law and Order. Although the development has a "Team Police Unit" its effectiveness to deal with the day to day problems is limited. (See Security Requirements, Page 20).

The average rental income per unit is approximately (\$75.00). The rent arrears are slightly over (\$100,000.00). (See Management Requirements, Page 37).

Utility Section

Utilities at the Development are both antiquated and inadequate for today's needs. There are seven (7) transformers located at the following addresses: The transformers, except for two new ones, are 31 years old.

| | | |
|-----------|-------------------------|-----------------------------------|
| Bldg. #1 | 111 Linskey Barry Court | - services Bldgs. #1,2,3,4 |
| Bldg. #5 | 39 Linskey Barry Court | - services Bldgs. #5,6,7,8 |
| Bldg. #10 | 4 Linskey Barry Court | - services Bldgs. #9,10,11,12 |
| Bldg. #16 | 3 Dalessio Court | - services Bldgs. #13,14,15,16,27 |
| Bldg. #22 | 63 Dalessio Court | - services Bldgs. #19,20,21,22 |
| Bldg. #26 | 111 Dalessio Court | - services Bldgs. #23,24,25,26 |
| Bldg. #17 | 40 Dalessio Court | - services Bldgs. #17,18 |

In the summer of 1979, the Housing Authority installed two (2) larger new transformers located at Bldg. #1 and Bldg. #22. To address today's appliance demands, and given the age of the remaining five (5) transformers, they should be replaced, as well as all necessary wiring. Cost estimate cannot be determined until an Engineering Study is made. The lead time for this installation is delayed by the length of time of shipment which can be between six ~~and~~^{to} nine months. Two oversized units were replaced at a cost of \$12,000. These units were re-built transformers and the only available units in the City. Over the years, underground piping (steam, sewerage, and condensate returns) has sagged, broken or leaked. To rectify this problem, a comprehensive analysis of the underground system is required and major excavation and upgrading needed prior to any aesthetic improvements.

An Engineering Study must be made of this development-wide program. The "D" Street Development is marred with broken side walks, poorly grassed areas, the lack of trees, truck and car paths throughout courtyards, burnt out dumpsters, strewn trash, broken doors, boarded windows, and most of all vacant, vandalized addresses giving the appearance of a battleground rather than a respectable place to live.

II OCCUPANCY DATAA. Vacancies

The vacancies at the Development create an additional burden. Around 1963, a massive move-out of minorities occurred at which time roughly (100) to (150) black and spanish families left. When these families moved out, the community made sure that they weren't coming back. Total destruction of these units occurred. The combination of massive move-out and a decreased maintenance force has led to the decay that presently exists.

B. Move Out/Move In Profile

The move-out/move-in profile for the past fourteen (14) months indicates a need for apartment rehabilitation. The profile is as follows:

| <u>YEAR</u> | <u>MONTH</u> | <u>MOVE-OUT</u> | <u>MOVE-IN</u> |
|-------------|--------------|-----------------|----------------|
| 1970 | March | 9 | 7 |
| | April | 5 | 3 |
| | May | 8 | 7 |
| | June | 2 | 2 |
| | July | 3 | 4 |
| | August | 10 | 5 |
| | September | 4 | 5 |
| | *October | 2 | 11 |
| | November | 5 | 3 |
| | December | 7 | 6 |
| 1980 | January | 6 | 5 |
| | February | 3 | 6 |
| | March | 5 | 10 |
| | April | 5 | 3 |
| TOTALS | | 92 | 77 |

* The month of October indicates an infusion of additional apartments readied for occupancy in part by a rehab crew.

Occupancy Data (continued)

C. Unit Configuration

The following occupancy chart will depict the status and configuration of the development:

| BR SIZE | UNITS as BUILT | UNITS ADJUSTED | ACTUAL DWELLING UNITS | UNITS PRESENTLY OCCUPIED | MOTH- BALLED UNITS | AVAILABLE UNITS FOR OCCUPANCY* | PRESENT WAITING LIST |
|------------|----------------------|-------------------|-----------------------------|--------------------------------|--------------------------|--------------------------------------|----------------------------|
| 1 | 207 | 184 | 148 | 124 | 36 | 24 | 28 |
| 2 | 360 | 343 | 295 | 249 | 48 | 46 | 12 |
| 3 | 264 | 248 | 215 | 199 | 33 | 16 | 7 |
| 4 | 93 | 83 | 62 | 57 | 21 | 5 | 4 |
| 5 | 48 | 54 | 48 | 46 | 6 | 2 | 1 |
| 6 | -- | 13 | 13 | 13 | -- | -- | -- |
| Total | 972 | 925 | 781 | 688 | 144 | 93 | 52 |

* Needing rehab

Since the waiting list is low and the vacancy rate is high, major rehabilitation and marketing strategies are critical! Given the current configuration of vacant addresses and scattered site vacancies, (see exhibit A, B, C, D, E,) a phased relocation plan can be implemented.

As scattered site vacancies are rehabilitated, tenants who have already been set up for relocation will be transferred to them. These tenants will be leaving buildings that are for the most part vacant. An example is building #9, and #11.

D. Present Village Concept

Presently the development is broken up into seven (7) villages, A, B, C, D, E, F, and G. Each village has a paid village coordinator working out of the Task Force office. I don't agree with this concept! (See plot plan A) "Present Vacant Addresses and Village Alignment"

The village coordinators must work for the Manager. The Development should still be broken up into seven (7) villages. The village coordinators would then be an arm of management into the community and an arm of the community into the Management Office. (see Plot Plan B) "Relocation and Secured Buildings"

The original village concept was designed to train tenants to better manage the development. Although I agree with this concept, it has been hindered by a variety of problems:

1. The village coordinators are misaligned. Their supervision emanates from the local task force office via directors. With this current line of responsibility the Housing Authority has no means of evaluating performance or training.
2. The village coordinators presently interview tenants, inspect apartments, attempt to organize addresses, report to their supervisor and the Manager. Because of the lack of optimum maintenance and the inability of the authority to meet targeted improvements, considerable frustration has increased to all parties concerned. (coordinators, tenants, the task force and development staff) In addition, the credibility of the authority and the village coordinators has been damaged.

By assigning the village coordinators to the Management Office and re-naming them as resident manager trainees, the Management Office can direct, train, and monitor tenants in organization, office procedure, craft exposure, etc.

Most importantly, virtually every phase of managing a development will be exposed. I might note that tenant privacy and records would have to be closely protected.

VACANT UNITS BROADWAY 501

AS OF JUNE 2, 1980

EXHIBIT A

Vacancies by Bedroom Size

1 BEDROOM

| Bldg. # | Apt. # | Address | Date of Move Out |
|---------|--------|------------------------|------------------|
| 4 | 134 | 132 Crowley Rogers Way | 5/31/80 |
| 4 | 151 | 173 Flaherty Way | 3/31/78 |
| 5 | 161 | 149 Flaherty Way | 7/31/75 |
| 6 | 206 | 111 Flaherty Way | 8/31/78 |
| 7 | 237 | 174 D. Street | 5/31/80 |
| 9 | 291 | 187 Orton Marotta Way | 2/29/76 |
| 9 | 295 | 187 Orton Marotta Way | 2/29/80 |
| 10 | 344 | 139 Orton Marotta Way | 2/28/78 |
| 12 | 416 | 52 W. Seventh Street | 9/15/76 |
| 13 | 439 | 28 W. Seventh Street | 2/29/76 |
| 13 | 445 | 40 W. Seventh Street | 4/30/80 |
| 14 | 484 | 4 W. Seventh Street | 11/30/75 |
| 15 | 533 | 7 Orton Marotta Way | 7/3/74 |
| 16 | 547 | 79 Orton Marotta Way | 3/31/80 |
| 16 | 557 | 55 Orton Marotta Way | 8/31/76 |
| 16 | 561 | 55 Orton Marotta Way | 6/15/78 |
| 17 | 589 | 30 Orton Marotta Way | 8/15/77 |
| 17 | 593 | 30 Orton Marotta Way | 5/15/79 |
| 21 | 736 | 25 Crowley Rogers Way | 1/31/80 |
| 22 | 801 | 95 B. Street | 8/31/77 |
| 23 | 826 | 12 Crowley Rogers Way | 9/30/76 |
| 23 | 828 | 12 Crowley Rogers Way | 11/30/76 |
| 24 | 852 | 72 Crowley Rogers Way | 12/31/79 |
| 26 | 916 | 189 W. Broadway | 4/30/80 |

VACANT UNITS BROADWAY 501

AS OF JUNE 2, 1980

EXHIBIT A

Vacancies by Bedroom Size

1 BEDROOM cont.

| Bldg. # | Apt. # | Address | Date of Move Out |
|---------|--------|----------------------|------------------|
| 27 | 937 ✓ | 66 Orton Marotta Way | 12/15/73 |
| 27 | 943 | 66 Orton Marotta Way | 7/15/77 |
| 27 | 952 | 90 Orton Marotta Way | 7/30/77 |
| 27 | 956 | 90 Orton Marotta Way | 1/31/76 |

VACANT UNITS BROADWAY 501

AS OF JUNE 2, 1980

Vacancies by Bedroom Size

EXHIBIT 3

2 BEDROOM

| Bldg. # | Apt. # | Address | Date of Move Out |
|---------|------------------------------------|-----------------------|------------------|
| 1. | 26 | 111 Linskey Barry Ct. | 4/15/80 |
| 5 | 172 ✓ | 39 Linskey Barry Ct. | 1/01/79 |
| 6 | 183 ^{VILLAGE 2} OFFICE | 40 Linskey Barry Ct. | 6/30/78 |
| 6 | 212 | 111 Flaherty Way | 5/15/78 |
| 7 | 240 | 174 D. Street | 3/31/80 |
| 7 | 246 | 198 D. Street | 4/30/80 |
| 8 | 259 ✓ | 37 Joyce Hayes Way | 6/30/78 |
| 8 | 263 L | 37 Joyce Hayes Way | 3/31/79 |
| 9 | 275 ✓ | 114 Orton Marotta Way | 12/15/74 |
| 9 | 297 — | 187 Orton Marotta Way | 8/31/79 |
| 10 | (331) ✓ | 4 Linskey Barry Ct. | 5/31/79 |
| 10 | (333) ✓ | 4 Linskey Barry Ct. | 3/31/77 |
| 10 | (335) — | 4 Linskey Barry Ct. | 1/31/73 |
| 10 | (347) ✓ | 139 Orton Marotta Way | 11/30/74 |
| 11 | 386 | 150 D. Street | 2/15/76 |
| 12 | 413 | 52 W. Seventh Street | 5/31/75 |
| 12 | (419) ✓ | 52 W. Seventh Street | 8/31/73 |
| 14 | 471 | 11 B. Street | 9/30/72 |
| 14 | 473 | 11 B. Street | 11/30/75 |
| 14 | 477 | 11 B. Street | 1/31/76 |
| 14 | 479 | 11 B. Street | 3/31/80 |
| 14 | 483 ✓ | 4 W. Seventh Street | 8/31/77 |
| 15 | 505 ✓ | 4 Dalessio Ct. | 7/31/74 |
| 15 | 536 | 7 Orton Marotta Way | 5/15/78 |
| 15 | 515 | 50 Orton Marotta Way | |

VACANT UNITS BROADWAY 501

AS OF JUNE 2, 1980

EXHIBIT B

Vacancies by Bedroom Size

1 BEDROOM cont.

| Bldg. # | Apt. # | Address | Date of Move Out |
|---------|--------|----------------------|------------------|
| 16 | 549 | 79 Orton Marotta Way | 7/31/77 |
| 16 | 554 | 55 Orton Marotta Way | 6/30/76 |
| 16 | 556 | 55 Orton Marotta Way | 5/31/79 |
| 16 | 560 | 55 Orton Marotta Way | 5/31/79 |
| 16 | 562 | 55 Orton Marotta Way | 4/30/80 |
| 16 | 570 | 3 Dalessio Ct. | 10/31/74 |
| 16 | 574 | 3 Dalessio Ct. | 11/15/77 |
| 17 | 590 | 30 Orton Marotta Way | 7/31/78 |
| 17 | 592 | 30 Orton Marotta Way | 8/15/74 |
| 17 | 606 | 40 Dalessio Ct. | 8/15/74 |
| 17 | 608 | 40 Dalessio Ct. | 5/30/80 |
| 17 | 610 | 40 Dalessio Ct. | 8/31/78 |
| 18 | 648 | 35 B. Street | 8/31/75 |
| 19 | 655 | 71 B. Street | 9/30/74 |
| 19 | 657 | 71 B. Street | 4/30/78 |
| 19 | 663 | 59 B. Street | 10/31/75 |
| 19 | 667 | 59 B. Street | 8/31/75 |
| 19 | 671 | 59 B. Street | 3/11/76 |
| 20 | 689 | 50 Flaherty Way | 5/31/78 |
| 22 | 790 | 63 Dalessio Ct. | 11/15/79 |
| 27 | 949 | 90 Orton Marotta Way | 7/31/77 |
| 27 | 950 | 90 Orton Marotta Way | 8/31/75 |
| 27 | 953 | 90 Orton Marotta Way | 7/15/75 |

VACANT UNITS BROADWAY 501

AS OF JUNE 2, 1980

EXHIBIT C

Vacancies by Bedroom Size

2=BEDROOM

| Bldg. - # | Apt. # | Address | Date of Move Out |
|-----------|--------|------------------------|------------------|
| 3 | 101 | 248 D. Street | 4/30/80 |
| 4 | 122 | 108 Crowley Rogers Way | 4/30/80 |
| 5 | 159 | 149 Flaherty Way | 7/15/75 |
| 8 | 260 | 37 Joyce Hayes Way | 12/31/78 |
| 10 | 328 | 4 Linskey Barry Ct. | 4/15/76 |
| 10 | 332 | 4 Linskey Barry Ct. | 12/15/75 |
| 10 | 336 | 4 Linskey Barry Ct. | 4/30/76 |
| 16 | 555 | 55 Orton Marotta Way | 7/31/75 |
| 16 | 573 | 3 Dalessio Ct. | 11/15/74 |
| 17 | 603 | 40 Dalessio Ct. | 11/15/74 |
| 17 | 605 | 40 Dalessio Ct. | 11/15/74 |
| 17 | 607 | 40 Dalessio Ct. | 10/31/78 |
| 19 | 656 | 71 B. Street | 11/30/77 |
| 19 | 658 | 71 B. Street | 4/30/77 |
| 19 | 662 | 59 B. Street | 8/31/76 |
| 21 | 755 | 1 Crowley Rogers Way | 10/31/78 |

VACANT UNITS BROADWAY 501

AS OF JUNE 2, 1980

EXHIBIT D

Vacancies by Bedroom Size

4 BEDROOM

| Bldg. # | Apt. # | Address | Date of Move Out |
|---------|--------|-----------------------|------------------|
| 9 | 292 ✓ | 187 Orton Marotta Way | 12/31/73 |
| 13 | 440 ✓ | 28 W. Seventh Street | 8/31/76 |
| 15 | 537 ✓ | 7 Orton Marotta Way | 8/31/73 |
| 23 | 819 | 12 Crowley Rogers Way | 11/30/75 |
| 23 | 826 | 12 Crowley Rogers Way | 5/31/75 |
| 24 | 843 ✓ | 72 Crowley Rogers Way | 8/31/79 |

VACANT UNITS BROADWAY 301

AS OF JUNE 2, 1980

EXHIBIT E

Vacancies by Bedroom Size

5 BEDROOM

| Bldg. # | Apt. # | Address | Date of M Cut |
|---------|--------|----------------------|------------------|
| 22 | 802 ✓ | 95 B. Street | 8/31/77 |
| 27 | 955 | 90 Orton Marotta Way | 10/30/77 |

III SECURITY

Security

A. General

Security is of major concern at all of our developments. It is one which must be addressed at the West Broadway 200-1 Development if we are to succeed in its revitalization.

Gangs of youth both from the development and the surrounding area dominate building entrance ways, making life miserable for the tenants who reside in them.

Mailboxes are torn from the hallways, security doors are abused to the point of obsolescence, roofs are damaged, basements and vacant apartments become harbors for stolen property and club houses, hallways become graffiti bound and stink of trash and urine, theft and vandalism of tenant and BHA property are an ever-present and ongoing problem.

The following narrative will illustrate a feasible plan to defend and effectively deal with the above problems.

The Boston Housing Authority must have trained and skilled investigators as well as round the clock patrolman walking the development. This plan calls for a minimum of (1) Developmental Security Supervisor, (1) investigator and (9) patrolmen.

B. Supervision

The security Supervisor would be directly responsible to the General Housing Manager. He and his staff would interact with all other departments allowing for clear lateral and vertical communication. His primary functions are to supervise his staff, develop training

programs for his staff and tenants, recommend capital improvements geared toward security, maintenance improvements geared toward security, deal with the local police department for training, support, communication etc., interface with the grievance panel, legal council, management, the local task force. District and Housing Courts to effectively rid the development of troublesome tenants. Schedule timely inspections of staff and property, investigate tenant and landlord grievances, investigate thefts, damaged property, assault and batterys and so on.

He must be responsible for the hiring and firing of staff. The development of incentives for employees, reporting formats, communication systems and their maintenance, transportation and its maintenance, time sheets etc.

C. Special Investigator

The Special Investigator's role is to continually keep the pressure on people and situations. Constantly building cases on individuals or groups of individuals so that the General Housing Manager and Security Supervisor can restore and sustain the legitimacy of law, order, justice and tenant responsibility.

He must interact with tenants, tenant task forces, village coordinators, patrolmen and the local police department, etc. Suggest methods which effectively deal with thefts and vandalism.

D. Patrolmen

These are the backbone of the security department. They must be trained and fully capable of defending themselves and tenants. A minimum requirement would be a special officer's license and training

by our legal staff.

A very sensitive area, but one which must be looked upon with an open mind, is the ability of a patrolman to defend himself in a dangerous situation.

Their job would be to patrol the development day and night, 24 hrs. per day, seven days per week. They would break up gangs, prevent loitering in hallways and entrance ways, make roof checks, check vacant apartments, basements, investigate and report problems, both general and specific within the development.

Report entrance security doors that are open or in disrepair, report security globes and lighting failures, report thefts to the General Housing Manager, disrupt and terminate thefts. Report move-outs or unauthorized move-ins, secure and guard capital improvements. Work closely with all phases of the development management, maintenance and tenant coordinators.

Security cont.

E. Year 1 Budget

1. Communications

A. Walkie-Talkies (11) @ \$1,500.00 ea. --- \$16,500.

B. Battery chargers (1) --- 900.

2. Uniforms

A. (11) @ \$300. --- 3,300.

3. Office Equipment

(desks, files, etc.) --- 2,000.

Total Operational Costs \$22,700.

4. Staffing Costs

A. (1) Supervisor --- 21,000

B. (1) Investigator --- 17,500

C. (9) Patrolmen @ 14,500 130,500

D. Overtime . 10% 16,800

Total staffing costs \$184,800.

5. Total Program Budget

A. 22,700

B. 184,800

\$207,500.

F. The second year budget may have to be revised to accomodate unforeseen needs.

G. Recommended Employee Selectivity

The Security Supervisor and the Investigator should not be tenants from the development. The reason for this statement is fundamental; if employees become intimidated and they may well be apt to be if they are tenants, then the program is doomed to fail.

Security cont.

G. On the other hand, I suggest that the patrolman be made up of a composition of (3) "D" St. tenants, (3) tenants from other BHA developments, and possibly (3) people from the private sector.

Boston Police

RULES AND REGULATIONS

RULE NO. 400

SPECIAL OFFICERS

Sections 1-3

March 1, 1978

This rule establishes Boston Police Department regulation of Special Officers. Its provisions are effective as of April 1, 1978, superseding all previously issued regulations, orders and bulletins concerning Special Officers and replacing Rule No. 63 of the Department 1950 Manual.

Sec. 1

QUALIFICATION OF APPLICANTS: Each applicant for a Special Officer's license shall meet the following qualifications:

- A. Be a United States Citizen
- B. Be at least 19 years of age
- C. Reside within the Commonwealth of Massachusetts
- D. Be able to read, write and understand the English language
- E. Meet physical and mental standards established by the Police Commissioner
- F. Be capable of understanding and performing the duties of a licensed Special Officer within the scope of Departmental policies and procedures
- G. Be a person of good moral character, without a felony conviction
- H. Pass, satisfactorily, the testing program prescribed by the Police Commissioner

Sec. 2

TRAINING: Special Officers shall be required to satisfactorily pass a prescribed test developed by the Boston Police Department Training Academy. This test shall consist of questions concerning the rights, duties, and responsibilities of Special Officers.

Sec. 3

APPLICATIONS: All applications for Special Officer licenses shall be made at the Licensing Section, first floor, Boston Police Headquarters, 154 Berkeley Street.

APPLICATION FORMS: Applications forms may be obtained at the Licensing Section and shall be filled out completely, under the penalties of perjury, and signed by the applicant.

Sec. 5 Applications for new licenses may be filed out at any time. Applications for the reissue of such licenses already existing should be filed at least 30 days before their expiration. All licenses shall expire annually on the first day of April, except that licenses may be issued in March to be valid for 12 months, beginning the next succeeding first day of April. Persons whose licenses have expired and have not been reissued will be liable to prosecution if assuming to act as Special Officers.

Sec. 6 **AUTHORITY:** Every Special Officer appointed under the provisions of this Rule shall have, while his license is in force, the power of a police officer to make arrests, preserve order and to enforce the laws of the Commonwealth and ordinances of the City of Boston in and upon the premises or locality specified in the license.

Special Officers, appointed as election officers or emergency officers pursuant to this Rule, shall possess during their term of service, all the powers and privileges and perform all the duties of regular police officers in the City of Boston Police Department.

Such Special Officers may be assigned to the different stations or placed under the command of some officer of rank at Headquarters or elsewhere as the Commissioner shall from time to time order. Every Special Officer appointed pursuant to this rule on the application of the Fire Commissioner of the City of Boston shall have the power of police officers to preserve order and to enforce all laws, ordinances, rules and regulations in force in Boston pertaining to fires and the extinguishment thereof, the prevention of fires, fire perils and other related matters, including, without limiting the generality of the foregoing, all laws, ordinances, rules and regulations governing the movement or standing of vehicles and designed to facilitate the free movement through Boston of fire department vehicles proceeding to any fire or answering any alarm.

Sec. 7 **BADGES AND SPECIAL OFFICER IDENTIFICATION CARDS:** Upon payment of a fee established from time to time a licensed Special Officer shall be furnished with a badge numbered and recorded in the Boston Police Licensing Section. In addition to the badge a licensed Special Officer shall be issued a Special Officer Identification Card, which shall include his name, name of employer, location or locations where Special Officer has police powers, his photograph, date of expiration of said license. When acting in the capacity of a Special Officer, the badge will be worn on outside of outer garment over the left breast and Special Officer Identification Card shall be carried on his person at all times when acting in such capacity.

He shall surrender this badge and Special Officer Identification Card at the end of his term of service or when he resigns or is discharged. In case a badge or Special Officer Identification Card is lost, the Special Officer shall immediately notify his employer who will notify the Licensing Section in writing, where a new badge and Special Officer Identification Card will be furnished upon payment.

Sec. 8 **UNIFORMS.** Special Officers shall not wear any uniform which might be mistaken for that of some Boston Police personnel.

Sections 32-11

Trousers of navy or black color shall have a one-inch wide red stripe on the outside seams from the side pocket to the bottom hem.

Shirts shall be any color except white, black, dark blue or midnight blue. No insignia shall be worn on shirt collars.

Jackets are optional, but no insignia shall be worn on jacket collars.

Shoulder Patches shall not have the words "Boston" or "Police" incorporated into their design. They shall not be shield shaped or in any way similar to a Boston Police Department shoulder patch.

Caps shall be worn as an integral component of a Special Officer's uniform. No metal cap badge will be worn on caps.

Any cap badge shall be of cloth or other non-metallic material and must not be similar to the Boston Police Department cap badge, shall not have a shield shape nor have the words "Police" or "Boston" inscribed upon it.

Sec. 32

WAIVER OF UNIFORM RESTRICTION: The Police Commissioner may waive the restriction of uniform colors, patches, insignia or other equipment as it may pertain to Special Officers in the employ of the City of Boston.

Sec. 9

FIREARMS: Special Officers licensed to carry firearms while employed shall only carry revolvers of .32 or .38 caliber. No automatic, no plastic firearm or replica of such or other type of handgun is permissible. Before the issuance of a Special Officer license, those applicants who are licensed to carry firearms shall be required to go to the Boston Police Department Revolver Range and pass a competency examination. Their weapon shall be subject to examination and approval by Department personnel before they are personally examined as to their knowledge of the nomenclature, operation and safe handling of their weapon, the capabilities and effective range of their ammunition and their ability to achieve a qualifying score with their weapon.

Sec. 10

OTHER ARMS AND EQUIPMENT: In addition to a firearm, in accordance with the provisions of Section 9 of this rule, the only arms and equipment authorized for use or possession by a licensed Special Officer are, a night stick or service cane, handcuffs and a flashlight. Special Officers who are holders of a Firearm Identification Card may carry a device or instrument which contains a liquid, gas, powder, or any other substance designed to incapacitate.

The use of dogs for any purpose by a licensed Special Officer on duty is forbidden unless prior written authorization of the Police Commissioner is obtained and in no event shall the use of dogs be authorized for crowd control purposes. The Police Commissioner may require any dog used by a Special Officer to be tested by Police Department personnel for proper training.

Sec. 11

DISCHARGE OF FIREARMS: A licensed Special Officer shall not discharge firearm in the performance of his duties other than for practice or training on a recognized and approved target range or similar authorized location except under the following circumstances:

- A. To defend himself or another from an unlawful attack which he has reasonable cause to believe could result in death or great bodily injury, or,
- B. To apprehend a fleeing felon when the officer knows, as a virtual certainty, (1) that the subject has committed a felony during the commission of which he inflicted or threatened to inflict deadly force upon the victim and, (2) that there is substantial risk that the felon in question will cause death or great bodily injury if his apprehension is delayed.

A firearm shall not be used as a signalling device or to summon assistance or for any other purpose except as provided herein.

Sec. 12

RESISTANCE - HOW MET: In making an arrest, no more force shall be used than is absolutely necessary for the safe custody of the prisoner or for overcoming any resistance that may be offered and for insuring the delivery of the prisoner into safekeeping. Any abuse of prisoners, whether by word or act, is forbidden.

Sec. 13

RULES AND REGULATIONS: It is the duty of every Special Officer to observe and obey rules and regulations set forth in this rule and all reasonable orders of Boston Police Officers in all matters involving the need for police services.

Sec. 14

DUTY TO ASSIST POLICE OFFICERS: Special Officers shall assist officers, when requested. In preserving the peace or taking a prisoner to a district station. Persons arrested by Special Officers shall be taken to the district in which the Special Officer has made the arrest, and a record shall be made in the same manner as for other arrests.

Sec. 15

DUTY WHEN ARRESTING: When an arrest has been made by a licensed Special Officer, it shall be his duty to notify the Boston Police Department, to furnish all pertinent facts and evidence to any Boston Police Officer(s) and to surrender to such officer(s) custody of the prisoner. A report of the incident shall be made by the police officer in the same manner as in other arrests. All weapons and contraband seized by Special Officers shall immediately be turned in to the District Station in which the property was seized. Other evidence seized by Special Officers may be retained by them pending disposition of the case.

Sec. 16

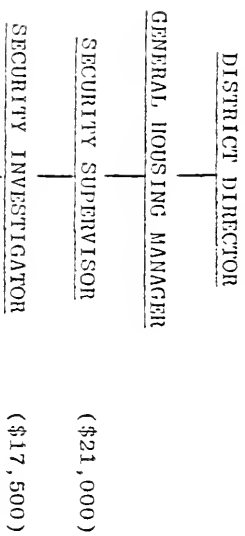
DUTY TO COOPERATE WITH POLICE OFFICERS: It shall be the duty of every licensed Special Officer to cooperate with Boston Police Officers, and Boston Police Officers shall cooperate with licensed Special Officers in the performance of their respective duties.

Sections 17-25

- Sec. 17 Participation of licensed Special Officers on or off duty, in police action where police are present, should be limited to identifying themselves to the officer(s) and offering their assistance.
- Sec. 18 In any situation requiring the services of a Boston Police Officer or when a Boston Police Officer is present at an incident, the judgment of the Boston Police Officer shall prevail. He is responsible for the proper handling and reporting of the incident in conformance with Departmental policies in effect at the time.
- Sec. 19 DISCHARGE OF FIREARMS OR USE OF FORCE PROCEDURE: All licensed Special Officers, upon firing their weapon or using other force to effect an arrest, shall make or cause to be made a report to the Commander of the district, wherein the incident occurred. A copy of the report shall be forwarded to the Internal Affairs Division.
- Sec. 20 STANDARD OF CONDUCT: A licensed Special Officer shall be expected to be knowledgeable of, and to comply with, this Department rule. Any Special Officer found guilty of a violation of any part of this rule may be punished by an oral or written reprimand, or by suspension or permanent revocation of his Special Officer's License.
- Sec. 21 COMPLAINTS AGAINST SPECIAL OFFICERS: Complaints concerning licensed Special Officers shall be investigated by the Internal Affairs Division of the Boston Police Department. An investigation shall be made in all such instances and a report with recommendations shall be forwarded to the Police Commissioner.
- Sec. 22 PROCEDURE FOR DISCIPLINARY ACTION: In the event the Police Commissioner determines that disciplinary action should be instituted against a licensed Special Officer, the Licensing Section shall cause to be served upon the licensed Special Officer notice as to the time, date and place of hearing of the charges with a statement of the reasons for the proposed disciplinary action.
- Prior to the scheduled date of the hearing, the Commissioner shall designate a Hearing Officer to conduct the hearing. The hearing will be held in accordance with procedures established under Rule 103 of the Rules and Regulations of the Boston Police Department.
- Sec. 23 CRIMINAL COMPLAINTS: In the event a licensed Special Officer is arrested and/or charged with a misdemeanor the Commander of the arresting officer's unit shall contact the Commander of the Licensing Section, who will determine whether or not the Special Officer's License is suspended, pending investigation, report and recommendations. In instances wherein the Special Officer is arrested and charged with the commission of a felony, the Licensing Section shall suspend the Special Officer's license pending disposition of the case. The Commanding Officer of the unit making an arrest or filing criminal charges against a licensed Special Officer shall submit a written report to the Internal Affairs Division. In all such cases the Internal Affairs Division shall conduct an investigation and file a report with the Commissioner.

- Sec. 24 NON-CRIMINAL COMPLAINTS: In the event a Boston Police Officer observes violations of Department Rules and Regulations, but does not institute criminal action or arrest of a Special Officer, a report shall be forwarded through the chain of command to the Internal Affairs Division for action in accordance with section 20 of this rule.
- Sec. 25 PUNISHABLE OFFENSES: Offenses which may result in the suspension or revocation of a Special Officer's license include but are not limited to the following:
- A. A violation of any section of this department rule.
 - B. Violation of any law under any statute or ordinance.
 - C. Drinking of alcoholic beverages while on duty.
 - D. Illegal use of narcotic, harmful or dangerous drugs.
 - E. Assumption of any police powers when not on duty.
 - F. Interference with any police officer while in performance of his duties.
 - G. Failure to obey a reasonable order by an officer of the Boston Police Department.
 - H. Violation of any firearm regulation or any violation of the conditions of his license.
 - I. Carrying more than one authorized firearm while on duty.
 - J. Serving or acting as a Special Officer for any security agency or other business entity other than the one listed on his license.
 - K. Serving or acting as a Special Officer while under suspension.
 - L. Carrying equipment or weapons not authorized by this rule.

SECURITY ORGANIZATION CHART



IV. WORK ORDER SYSTEM

Work Order System

- A. The Work Order System is predicated on five (5) rules:
1. Materials are at the Development Site where Inventory Control files are kept. The "Inventory Control Clerk" has a minimum/maximum system which indicates costs as well as ordering and usage trends. Materials used are charged off to a "Unit Control File". The "Unit Control File" indicates the cost of all maintenance, recording labor and material costs by apartment number referring to specific work order numbers. Copies of work orders would be filed in numeric order in a "Work Order File".
 2. Competant and adequate craftsmen are at the development site, ready with the proper tools and materials to address and particular need.
 3. Speed and quality of the delivery system from the time any given work order is initiated to the time it is completed. This is accomplished via an evaluation system. The principle evaluators are the Manager, the Maintenance/Contract Supervisor, and village coordinators and the residents. The evaluation system is a form of checks and balances (see Forms 1, 2, 3 and 4 attached).
 4. Cost Reduction will ultimately result when crafts and staff realize that tighter supervision, tighter controls and availability of stock, and improved monitorization systems are being enforced.
- B. To attain these goals the following work order system is presently being put in place:
1. A Work Order/Maintenance Clerk is in place under a one (1)

year contract. His job is to receive, record and screen all maintenance service requests for priority. Until this person is totally trained, aid from the Maintenance/Contract Supervisor, crafts and General Housing Manager is imperative.

2. The Work Order Clerk issues work orders at the beginning of each work day to the appropriate development personnel as well as the anticipated stock.

3. Utilize and be accountable for the inventory and its system. (i.e. minimum/maximum and stock on hand, the unit control files, and work order file.)

4. Record the nature of daily service requests, length of time and cost for completion, by craft costs for materials used and totals, (please note work order log attached).

C. To establish a criteria for evaluation of crafts response, quality of craftsmanship, tenant charges etc. there are three (3) key people.

The Maintenance/Contract Supervisor, who would randomly be checking work orders throughout the development, the General Housing Manager ^{seven (7) General Managers} and three ^{three (3) Village Coordinators} Village Coordinators. Their job would also be to

check the work order log daily, check with tenants to coordinate date and time of crafts delivery, check the work order with the ^{for the entire operation} tenant for its accuracy. The primary responsibility would be the ^{Village Coordinators in addition to the} General Housing Managers. Organize buildings, report problem areas,

learn the general jobs, report to the manager problems in crafts-
manship, delays etc. Their roles would be the beginning of a long ^{to develop a long-term relationship. The group of four will be working} range goal ~~which would be the beginning of resident contributions.~~ ^{the goal}

Inventory levels would be based on site for a thirty-day period.

This would be backed up by Central Stores and agreements with local vendors carrying easy to reach materials and items. I also

recommend that the Housing Authority allow the petty cash maximum to be raised to \$1000.00. Safeguards and accountability measures would be measured by the District Director. The reason for this action is to allow more autonomy for procurement but at the same time taking benefit of the mass purchases^{es} savings afforded to the Authority.

Work Order Flow

This illustrates the average weekly work flow, what work orders are incoming, completed, the scope of incoming, completed, and outstanding work orders by craft. At any given time via written requests development-wide, Village Coordinators, word of mouth, and apartment inspections^{etc} and work orders in any category can be manifested.

| <u>Craft</u> | <u>W/O Incoming</u> | <u>W/O Completed</u> | <u>Scope Major/Norm</u> | | <u>W/O Outstanding</u> | <u>W/O Major/Norm</u> | |
|--------------|-------------------------|--------------------------|-----------------------------|-----------|----------------------------|---------------------------|------------|
| Plumbing | 20 | 22 | 12 | 8 | 136 | 50 | 76 |
| Carpentry | 35 | 35 | 12 | 23 | 4 | 0 | 4 |
| Glazing | 9 | 8 | 1 | 0 | 21 | 14 | 7 |
| Plastering | 3 | 9 | 3 | 0 | 16 | 16 | 0 |
| Painting | 1 | 1 | 1 | 0 | 2 | 2 | 0 |
| Electrician | 6 | 10 | 3 | 7 | 14 | 6 | 8 |
| Steamfitting | 2 | 6 | 3 | 3 | 16 | 9 | 7 |
| Appliance | 8 | 8 | 8 | 0 | 14 | 14 | 0 |
| Floor Tile | 4 | 0 | 4 | 0 | 150 | 150 | 0 |
| Bricklayer | 2 | 2 | 2 | 0 | 5 | 5 | 0 |
| Totals | <u>92</u> | <u>101</u> | <u>60</u> | <u>41</u> | <u>378</u> | <u>276</u> | <u>101</u> |

MONITORIZATION AND REPORTING FORMATS1. MAINTENANCE REPORT

This form is designed to log the incoming work orders by craft, when its completed, to whom the work was assigned, the cost of labor and materials and any comments the craftsmen, Work Order Clerk or Maintenance/Contract Super. may have

The Primary responsibility for it's accuracy is the Work Order Clerk. He would work in conjunction with the Maintenance/Contract Super. and Manager.

2. WORK ORDER FOLLOW UP REPORT

The Village Coordinators will meet every working day with the Maint/Work Order Clerk. A copy of the Work Order Log is given to the Village Coordinator Supervisor.

The Village Coordinators will then visit the apartment to determine the accuracy of the information on the Work Order, the response time, tenant's comments etc.

The individual apartment reports will then be given daily to the Manager at which time any problems may be worked out. Of course if a problem of emergency nature occurs Management will be notified immediately.

3. MANAGEMENT SUPERVISORY ACTION FORM

When a problem occurs and there is conflict between the information on a completed Work Order and the information gotten by the Village Coordinator; the Manager and Maint./Contract Supervisor will get together with the craft, Village Coordinator and possibly the tenant for inspection. In the comments section the Manager will note what action has been taken.

3. MANAGEMENT/SUPERVISORY ACTION FORM CONT'D

This form will then be sent weekly to the District Directors office for scrutiny.

4. WEEKLY WORK ORDER REPORT

This form will be made out by the Work Order Clerk and be scrutinized by his supervisors.

It will indicate the quantity of Work Orders completed by the Craft, there nature (Normal/Major), and the name of the craft.

This form will be sent to the District Director weekly for review.

| APT. NO. | ORDER NO. | WORK ORDER ISSUED | NATURE of COMPLAINT | V/O REG. by CRAFT | COM- PLETED | GRANT DATE | COST of LABOR | COST of MATERIAL | COMMENTS |
|-------------|--------------|-------------------------|---------------------------|----------------------|----------------|---------------|---------------------|------------------------|----------|
|-------------|--------------|-------------------------|---------------------------|----------------------|----------------|---------------|---------------------|------------------------|----------|

WORK ORDER FOLLOW-UP REPORT

WORK ORDER NUMBER APT. NO. ADDRESS NAME of TENANT

Date: Village:

Form - I Coordinator:

COMPLAINT DATE ISSUED DATE COMPLETED WORKER & TRADE

DATE CONTACTED NATURE of PROBLEM DATE REPORTED DATE COMPLETED

1. Satisfaction with Work. (check one)

Very satisfied

Satisfied

Not at all Satisfied

2. How long did it take the worker to complete the job? _____

3. Were you asked to sign the Work Order?

Yes _____ No _____

4. Did you sign it? Yes _____ No _____

MANAGEMENT/SUPERVISORY ACTION FORM

| WORK ORDER NUMBER | TECHNICAL NAME | ADDRESS | DATE | VILLAGE COORDINATOR | CRAFTSMEN'S NAME | COMPLAINT | ACTION TAKEN |
|-------------------------|-------------------|---------|------|------------------------|---------------------|-----------|-----------------|
|-------------------------|-------------------|---------|------|------------------------|---------------------|-----------|-----------------|

Total
Work
Orders
Completed
By "Ship-
Craft"

NAME

H

N

M

N

M

N

M

N

M

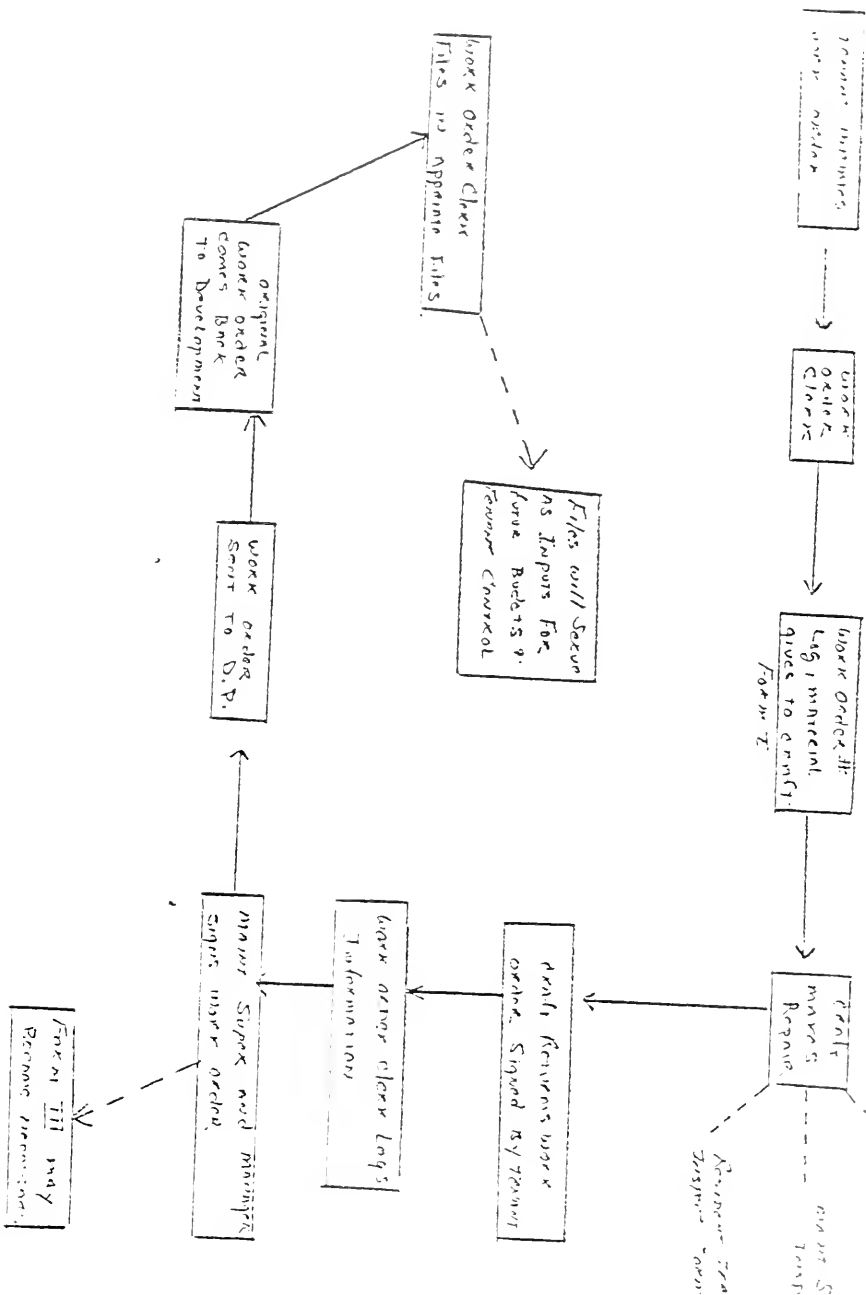
N

M

N

PT

Block Order Flow Chart



D St. Development

The over-all management plan for the "D" St. Development incorporates one basic premise. The Manager is totally responsible for his or her development.

The plan is to give the necessary tools to the Manager and set goals and targets with clear lines of communication. These goals are to provide and maintain clean, safe and sanitary housing. Management, Maintenance, and Security levels will require upgrading to meet the following goals:

1. RENT COLLECTION: within a one (1) year period the D St. arrearages will decrease by a minimum of 25% to 40%. Most recently a Housing Management Assistant has been hired from pilot funds. One of her primary functions is rent collection. The District Director and General Housing Manager will closely monitor this process. As a result there will undoubtedly be major increases in rental income and evictions.

The "D" St. development must be brought under control. Two (2) necessary components of rent collection and nuisance evictions. The development must enforce at a minimum the obligations of its lease. Troublesome families will be evicted. Evictions will be increased by

Case closed

the interfacing of the tenants. security department, resident management trainees, general housing manager, housing management assistant, and the movement of the District Directors office to the development. (see attached cause procedure)

2. Increased maintenance and in house major repairs.
3. Scattered site vacancy rehab. (approximately ninety-three (93) back on the rent roll)
4. The securing and security of all vacant addresses.
5. The relocation and close down of buildings.
6. See to it that capital improvements meet specific target dates.

The present needs are predominantly maintenance delivery. For this reason, the occupancy level should be maintained at roughly seven-hundred (700) to seven-hundred fifty (750) units. Once these units are brought up to code, progress in the "D" St. marketing strategy can begin. To market "D" St., basic fundamental changes must occur: (A) troublesome tenants must be evicted, (B) security must be put in place and working (C) the development's substandard conditions must be changes, and (D) the aesthetics of the develop drastically improved. When these four (4) areas are working and working well, then and not until then should decisions be made to either modernize, defend or tear down buildings.

Presently the development management office is fully staffed with the exception of seven (7) resident management trainees.

The District Director, Manager and a new budget staff will begin work on a development-based budget shortly.

The General Housing Manager will be responsible for at least the following:

1. Supervise, train, motivate and evaluate employees and tenants.
2. Accomplish developmental management, modernization, maintenance and security objectives.
3. Independent responsibility for day to day operations, including planning and assigning work, and evaluating performance of every subordinate and supportive structure.
4. Purchase and requisition supplies and services within the confines of HUD/EOCD and BHA regulations. (Given todays prices some over-all thought and negotiations is well over-due concerning minimum bidding regulations.)
5. Initiate detailed analysis of contractual requirements as they pertain to his/her development; this would include but would not be limited to long and short term capital improvements, contractual planning, implementation, monitorization, reporting, adherence to performance levels and approvals or disapprovals.
6. Reduce rent arrearages on a scheduled timely procedural basis. Pursue the obligations of both the tenant and the landlord as they pertain to the lease, tenant handbook, the State Sanitary Code, legal documentation and evictions.
7. Organize tenants, fosters tenant input, evaluates tenants for acceptability, cleanliness, and lease violations, creates positive peer pressure at all levels, building organization etc. Liason with the local police Housing Authority police, and local courts.
8. Inspects hallways, basements, tenants apartments, employees, contractors, job sites, random completed work orders, inventories, security systems, accounting systems, budgets, etc. daily. Take all necessary steps to insure maximum efficiency, quality workmanship, apartment and hallway cleanliness and cost effectiveness.

9. Works with residents and the District Director to assemble information required for long range management planning and budgeting. Attend tenant, staff and community meetings on a regular basis.
10. Prepares accurate periodic reports as required.
11. Inspects vacant apartments immediately, utilizing the attached apartment inspection form. Insures proper apartment rehabilitation by inspecting work at every level of repair. Insures immediate apartment rental.
12. Adheres to the current and future "TSAP's" rules and regulations and recommends potential improvements as they apply to "D" St.

The Housing Management Assistant collects rent, professionalizes the office, keeps accurate records, rents apartments, works closely with all phases of the operation, meets with tenants and tenant groups, reports, inspects, acts in the behalf of the manager and accepts most of the primary functions of the General Housing Manager.

The clerk typists carry out the day to day typing, answer phone calls, channel communications, keep accurate files, maintain records and report directly to the HMA and/or the GHM.

The Resident Management Trainees act as an arm for management and the tenants. They will act as students learning all the phases of the operation. They will supply the Manager with broad as well as specific information as it pertains to the development. They will aid in rent collection, work order evaluation, peer pressure, building and hallway organization, help the work order clerk with information,

learn by doing those necessary areas that will bring the developments standard of living up. These work areas and other areas will prepare them for Phase II.

5/27/80 Paul J. Lee
2/22 6/4/80

Procedure for Cause Evictions (other than non-payment of rent)
Lease Provisions. The current BHA lease provides that
the lease may be terminated for the following reasons (other than
non-payment of rent):

- A) Reasonable likelihood of serious repeated interference with rights of other Tenants;
- B) Reasonable likelihood of serious repeated damage to apartment or common areas;
- C) Excess income;
- D) Creation or maintenance of a serious threat to health or safety of other tenants;
- E) For 1 year from date of occupancy serious and intentional misrepresentation regarding application;
- F) If Tenant's family increases or decreases, and Tenant refuses legal transfer.
- G) If Tenant unable, because of physical or mental incapacity to maintain unit in clean condition ^{to} (BHA obliged/consult appropriate social agencies and make reasonable effort to relocate);
- H) Tenant uses premises for illegal or immoral purposes;
- I) Violation by Tenant of any term, condition, or covenant of lease.

II. Pre-Conference Memo. If eviction is contemplated, Manager to submit to Legal Department a Pre-Conference Memo containing the results of a full investigation of all facts, including:

- A. Tenant(s)'s name and address;
- B. Proposed cause(s) under the lease (see Para. I, above)
- C. All facts supporting each reason in B;
- D. Statements of witnesses (with name, address, telephone number, and description, e.g., neighboring Tenant, BHA employee, etc.) and documents on which Mgr. will reply;
- E. Determination as to whether this Tenant has filed any HUD complaint(s) or legal action against BHA within the past 6 months;
- F. Potential problems with the case (e.g., willingness of witnesses to testify, factual disputes, etc.)

III. Legal Dept. Review. Upon receipt of Pre-Conference Memo, Legal Department to assign attorney to case.

- A. Within 14 days, assigned attorney will screen pre-conference memo to determine sufficiency of information provided; if sufficient
- B. Assigned attorney and Mgr. will review case and make a determination as to whether or not to proceed.
- C. In case of disagreement, the matter will be referred to David Gilmora and Howard Cohen for resolution.

IV. Conference Letter.

- A. After a determination to proceed, Mgr. prepares Conference Letter in consultation with assigned attorney.
- B. Conference letter to specify time, date, and subject matter (Cf II B & C above).
- C. Conference letter, which must be received by Tenant at least 7 days prior to date set for conference, shall be delivered:
 - 1) In hand to Tenant (or adult member of his/her family) with Affidavit of Service (see attachment) filled out by BHA employee who delivers;
 - OR
 - 2) Sent by registered mail, return receipt requested*
- D. Copies of conference letter to: file, District Director & Legal Department.

V. Private Conference.

- A. If agreement, signed by Manager and Tenant, with copies to Tenant and Legal Department. (Copy to Legal to include cover memorandum explaining the Private Conference and the reason(s) for the agreement).

*If Tenant asserts, and manager cannot disprove, that he or she received the letter less than 7 days prior to the scheduled private conference, the private conference shall be postponed to a date at least 7 days after the date of receipt of the letter.

But if, after Private Conference, Mgr. and assigned attorney determine the existence of good cause for pursuing eviction (in case of disagreement, the matter will be referred to Gilmore and Cohen for resolution), the Manager shall:

1. Deliver to Tenant a Notice of Intention to Evict by:
 - a) In hand delivery to Tenant (or adult member of his/her family) with Affidavit of service or
 - b) by registered mail, Return Receipt Requested.
2. Send notice to Hearing Panel including:
 - a) Copy of Notice of Intention to Evict;
 - b) describing reasons for eviction as revealed by Private Conference;
 - c) requesting an AM or PM time slot if necessary for the attendance of witnesses;
 - d) copy above to: File, District Director, and Legal Dept.

VI. Hearing

- A. As soon as hearing scheduled, Manager shall make appointment with Legal for each of the witnesses and for him or herself in order to review case for presentation before the Panel;
- B. Manager to present case to Panel with appropriate assistance from Legal;
- C. Manager shall contact Legal on receipt of Hearing Panel decision so that (if decision favorable) Summary Process can be commenced.

VII. Post-Hearing. Manager to keep Legal Department informed of any change of status concerning tenancy or witnesses..

AFFIDAVIT OF SERVICE

I, _____, a Boston
Housing Authority employee at the _____
Development, hereby certify that I gave notice to
the within named _____ to
_____ tenant
appear at a Private Conference with the Manager by
giving to her/him, _____, an
adult member of his/her household, in hand the
original notice, of which the within is a true copy
thereof, at approximately _____
o'clock P.M./A.M. on _____ at _____
_____, Date _____ Apt. # _____
_____ street address
District of the City of Boston.

Signed under pains and penalties of perjury.

Date: _____

NOTIFICACION PARA LAS PERSONAS DE HABLA HISPANICA. SI USTED NO PUEDE LEER INGLES TENGA ESTE DOCUMENTO: A LA OFICINA DEL ADMINISTRADOR DE SU CASERIO.

NOTICE OF PRIVATE CONFERENCE

Date: _____

Dear Tenant:

You are hereby invited to have a private conference with the Manager at the Manager's office on _____, 19____, at _____ o'clock, to discuss the matter of your rent arrearage in the amount of \$_____, according to Boston Housing Authority records.

If you do not appear for this conference, or contact the Manager before the time scheduled for the conference to arrange a different time for the conference, it could lead to the beginning of the eviction process against you. At the end of the conference, or if you do not appear for the conference, the Manager will determine whether or not to proceed with the eviction process.

The Manager will notify you if he or she determines to proceed with the eviction process.

You are advised that anything you say at this conference is not confidential, and may be used in any subsequent proceeding. You have a right to remain silent. See Tenant Handbook for information re: Task Force assistance, and the assistance of legal counsel.

Very truly yours,

BOSTON HOUSING AUTHORITY

Manager

NOTIFICACION PARA LAS PERSONAS DE HABLA HISPANA: SI USTED
NO PUEDE LEER INGLES TENGA ESTE DOCUMENTO: A LA OFICINA
DEL ADMINISTRADOR DE SU CASERIO

NOTICE OF PRIVATE CONFERENCE

Date: _____

Dear Tenant:

You are hereby invited to have a private conference with the Manager at the Manager's office on _____, 19____ at ____ o'clock, to discuss the matter of certain complaints that have been made against your tenancy, which if substantiated, may be grounds for your eviction from the BRH. These complaints include:

If you do not appear for this conference, or contact the Manager before the time scheduled for the conference to arrange a different time for the conference, it could lead to the beginning of the eviction process against you. At the end of the conference, or if you do not appear for this conference, the Manager will determine whether or not to proceed with the eviction process.

The manager will notify you if he or she determines to proceed with the eviction process.

You are advised that anything you say at this conference is not confidential, and may be used in any subsequent proceeding. You have a right to remain silent. See Tenant Handbook for information re: Task Force Assistance, and the assistance of legal counsel.

Very truly yours,
BOSTON HOUSING AUTHORITY

NOTIFICACION PARA LAS PERSONAS DE HABLA HISPANA: SI USTED FOM: 43
NO PUEDE LEER DICHO DOCUMENTO, A LA OFICINA
DEL ADMINISTRADOR DE SU CASERO.

A G R E E M E N T

Date: _____

It is hereby agreed between Tenant,

(Name)

(Apt. #) _____ (Address) _____ (Project) _____

and Manager, _____

that: _____

It is understood that this Agreement does not otherwise waive any
rights of either party, nor change the terms of the Lease, in-
cluding the amount of the monthly rent.

Tenant

Manager

NOTIFICACION PARA LAS PERSONAS DE IDIOMA HISPANO: SI USTED FORME
NO PUEDE LEER O ENTENDER ESTE DOCUMENTO, A LA OFICINA
DEL REGISTRO LE SU CALIFICAR.

NOTICE OF INTENTION TO EVICT

Date: _____

Dear _____

You are hereby notified that the Boston Housing Authority, having had a private conference with you or having given you an opportunity for such a private conference at which you did not appear, has determined to take steps which could lead to your eviction on the grounds indicated in the notice of private conference.

You will, therefore, be given an opportunity to appear before a Hearing Panel which will hear this matter.

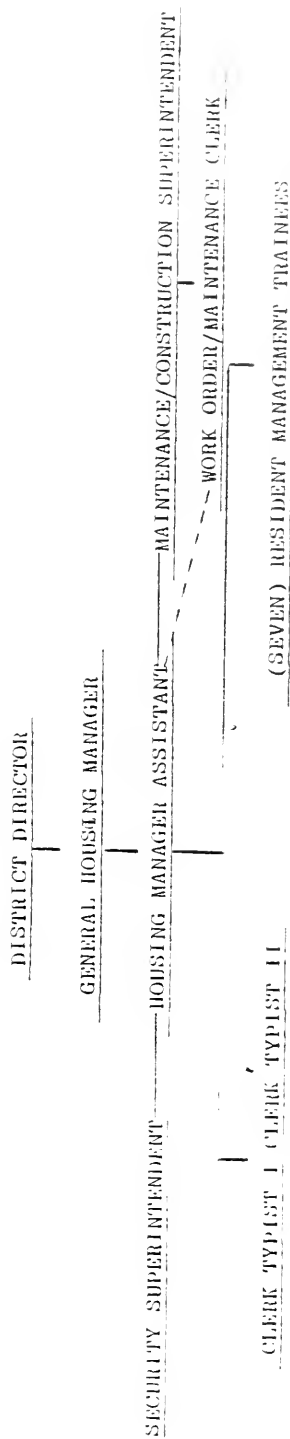
You are advised that you have a right to a hearing before a Hearing Panel, and a right to be represented at the hearing. Anything you say at the hearing is not confidential and may be used in any subsequent proceeding. You have a right to speak, to present witnesses and documentary evidence, and to question any witnesses against you, and you have a right to remain silent.

You will be notified of the time and place of the hearing before the Hearing Panel.

BOSTON HOUSING AUTHORITY

By: _____
Manager

MANAGEMENT ORGANIZATION CHART



RELOCATION PLAN - WEST BROADWAY

The following proposed Relocation Plan for "D" St. is submitted after careful review of the occupied and vacant units throughout the entire development. (see Development maps, page__, Exhibit__) The blackened areas on the maps represent vacant units which encompass either entire "wings" (a "wing" contains a section of the building containing twelve (12) units), or in some cases, 75% of an entire building. This plan presents various alternatives toward addressing the relocation program. Since the development has varied interwoven conditions such as, a poor public image, a small waiting list and major physical improvement needs any relocation plan must be phased. There follows the recommended steps toward a comprehensive relocation program.

Phase I

Close down and mothball the following buildings and addresses:

A. Building #9 - 137 Orton Morotta Way
 163 Orton Morotta Way
 1 Linskey Barry Court

Transfer the residents at 137 Orton Morotta Way to rehabbed scattered site vacancies. This would decrease vacancies at other building locales thus filling addresses and decreasing the developments decay. There are eight (8) occupied units in building #9. It is recommended that the following addresses be secured and mothballed and the following scattered site vacancies be rehabbed and filled.

| <u>Presently Occupied Units</u> | | <u>Transferred to</u> | |
|---------------------------------|------------------|-----------------------|------------------|
| <u>Apt. #</u> | <u>Apt. Size</u> | <u>Apt. #</u> | <u>Apt. Size</u> |
| 296 | 4 BR | 440 | 4 BR |
| 300 | 4 BR | 537 | 4 BR |
| 299 | 1 BR | 344 | 1 BR |
| 290 | 3 BR | 603 | 3 BR |

| <u>Apt. #</u> | <u>Apt. Size</u> | <u>Apt. #</u> | <u>Apt. Size</u> |
|---------------|------------------|---------------|------------------|
| 294 | 3 BR | 605 | 3 BR |
| 298 | 3 BR | 607 | 3 BR |
| 289 | 2 BR | 275 | 2 BR |
| 293 | 2 BR | 263 | 2 BR |

Total # of Units - 8

B. Building #11 - 88 W. 7th St.(vacant)
 76 W. 7th St.(vacant)
 150 "D" St. (see below)

It is recommended that the two vacant addresses be secured and mothballed (88 West Seventh St. and 76 West Seventh St.), and that the eleven (11) families at 150 "D" St. be relocated to the following scattered-site vacant units, preparatory to securing and mothballing the 150 "D" St. address:

| <u>Presently Occupied Units</u> | | <u>Transferred to Scattered Site Vacancies</u> | |
|---------------------------------|------------------|--|------------------|
| <u>Apt. #</u> | <u>Apt. Size</u> | <u>Apt. #</u> | <u>Apt. Size</u> |
| 387 | 3 BR | 328 | 3 BR |
| 391 | 3 BR | 336 | 3 BR |
| 395 | 3 BR | 332 | 3 BR |
| 388 | 2 BR | 335 | 2 BR |
| 392 | 2 BR | 331 | 2 BR |
| 396 | 2 BR | 333 | 2 BR |
| 390 | 2 BR | 347 | 2 BR |
| 394 | 2 BR | 419 | 2 BR |
| 393 | 3 BR | 159 | 3 BR |
| 389 | 2 BR | 260 | 2 BR |
| 385 | 2 BR | 573 | 2 BR |
| Total units (11) | | | |

C. Building #16 - 55 Orton Morotta Way

Building #16 is $\frac{2}{3}$ full with the exception of one address consisting of four (4) occupied apartments. It is recommended to relocate the following families to the following rehabbed units:

Presently Occupied Units

Transferred to

| <u>Apt. #</u> | <u>Apt. Size</u> | <u>Apt. #</u> | <u>Apt. Size</u> |
|---------------|------------------|---------------|------------------|
| 563 | 3 BR | 843 | 4 BR |
| 559 | 3 BR | 755 | 3 BR |
| 558 | 2 BR | 259 | 2 BR |
| 564 | 2 BR | 172 | 2 BR |

Total # of units (4)

D. Building #27 - 38 Joyce Hayes Way
 90 Orton Morotta Way
 66 Orton Morotta Way

Building # 27 has one address (38 Joyce Hayes Way) totally vacant. Another address adjacent to it is 50% vacant (90 Orton Morotta Way) It is recommended to secure and mothball 90 Orton Morotta Way and transfer the residents as follows:

Units Presently Occupied

Transfer To

| <u>Apt. #</u> | <u>Apt. Size</u> | <u>Apt. #</u> | <u>Apt. Size</u> |
|---------------|------------------|---------------|------------------|
| 953 | 2 BR | 483 | 2 BR |
| 957 | 1 BR | 505 | 2 BR |
| 960 | 1 BR | 937 | 1 BR |
| 951 | 3 BR | 802 | 5 BR |
| 959 | 2 BR | 689 | 2 BR |

The affect on the development will be as follows:

Phase I

A. will close down (1) 1 BR, (2) 2 BR's, (3) 3 BR's and (2)

4 BR's, totalling 8 units

(B) will close down (7) 2 BR's, and (4) 3 BR's; totalling 11 units

(C) will close down (2) 2 BR's and (2) 3 BR's totalling 4 units

(D) will close down (1) 1 BR, (3) 2 BR's, and (1) 5 BR, totalling 5 units.

When apartments are rehabbed the following size scattered site vacancies will be available for transfers:

2 (1 BR's), 14 (2 BR's), 3 (3 BR's), 3 (4 BR's) and 1 (5 BR)

The following configuration, under Phase I due to relocation, will be:

A. Building #9 will be entirely shut down; it is composed of (6) 1 BR's, (15) 2 BR's, (12) 3 BR's, and (3) 4 BR's. Total # of units (36)

B. Building #11 will also be entirely closed down; it is composed of (6) 1 BR's, (15) 2 BR's, (12) 3 BR's, and (3) 4 BR's. Total # of units (36).

C. Building #16 one address closed down; it is composed of (3) 1 BR's, (6) 2 BR's, and (3) 3 BR's, total # of units (12)

D. Building #27 two address close downs, (9) 1 BR's, (6) 2 BR's (3) 4 BR's, and (6) 5 BR's, total # of units (24)

Phase II

Secure and mothball the following addresses: (these addresses do not include Buildings 9, 11, 16, and 27 (under Phase I) Building #7, 15, 17, 18, 21, 23, and 24.

A. Building #7 at 62 Orton Morotta Way will close down the following sized units, (3) 1 BR's, (3) 2 BR's, (3) 3 BR's, and (3) 4 BR's, total # of units (12)

B. Building #15 at 31 Orton Morotta Way will close down the following sized units; (6) 2 BR's, (3) 3 BR's, and (3) 1 BR, total # of units (12)

C. Building # 17 at 6 Orton Morotta Way will close down the following size units: (3) 1 BR's, (3) 2 BR's, (3) 3 BR's, and (3) 4 BR's, total # of units (12)

D. Building #18 at 15 Flaherty Way will close down the following size units: (3) 2 BR's, (3) 3 BR's, (3) 1 BR's, and (3) 4 BR's, total # of units (12).

E. Building #21 at 64 Dalessio Court will close down the following size units: (6) 2 BR's and (6) 3BR's, total # of units (12).

F. Building #23 at 33 Crowley Rogers Way will close down the following size units: (3) 1 BR's, (6) 2 BR's, and (3) 4 BR's, total # of units (12)

G. Building #24 at 48 Crowley Rogers Way will close down the following size units: (6) 1 BR's, (3) 4 BR's, and (3) 5 BR's, total # of units (12)

A Matrix of Proposed Secured Vacancies

| Blk. # | 1 BR | 2 BR | 3 BR | 4 BR | 5 BR | Total units by Building |
|--------|------|------|------|------|------|----------------------------|
|--------|------|------|------|------|------|----------------------------|

PHASE I

| | | | | | | |
|------|---|----|----|---|---|----|
| A. 9 | 6 | 15 | 12 | 3 | 6 | 42 |
| B.11 | 6 | 15 | 12 | 3 | - | 36 |
| C.16 | 3 | 6 | 3 | - | - | 12 |
| D.27 | 9 | 6 | - | 3 | - | 24 |

PHASE II

| | | | | | | |
|------|---|---|---|---|---|----|
| A. 7 | 3 | 3 | 3 | 3 | - | 12 |
| B.15 | 3 | 6 | 3 | - | - | 12 |
| C.17 | 3 | 3 | 3 | 3 | - | 12 |
| D.18 | 3 | 3 | 3 | 3 | - | 12 |
| E.21 | - | 6 | 6 | - | - | 12 |
| F.23 | 3 | 6 | - | 3 | - | 12 |
| G.24 | 6 | - | - | 3 | 3 | 12 |

TOTAL UNITS
BY SIZE

| | | | | | |
|----|----|----|----|---|-----|
| 45 | 62 | 45 | 24 | 9 | 193 |
|----|----|----|----|---|-----|

This would reduce the potential level to seven hundred twenty-six (726) units.

A Matrix of Families to be Relocated by Bedroom Size

| Bldg. # | | 1 BR | 2 BR | 3 BR | 4 BR | 5 BR | Total # of units Requiring Relocation |
|---------------------|-------|------|------|------|------|------|--|
| Phase I | A. 9 | 1 | 2 | 3 | 2 | - | 8 |
| | B. 11 | - | 7 | 4 | - | - | 11 |
| | C. 16 | - | 2 | 2 | - | - | 4 |
| | D. 27 | 1 | - | 3 | - | 1 | 5 |
| Total # of units | | 2 | 11 | 12 | 2 | 1 | 28 |

A Matrix which illustrates the affect of Relocation on Scattered Site Vacancies.

| App # | 1 BR | 2 BR | 3 BR | 4 BR | 5 BR | Total # of Scattered Site Vacancies to be Filled |
|-------|------|------|------|------|------|--|
| 159 | | | 1 | | | |
| 172 | | 1 | | | | |
| 259 | | 1 | | | | |
| 260 | | 1 | | | | |
| 263 | | 1 | | | | |
| 275 | | 1 | | | | |
| 328 | | | 1 | | | |
| 331 | | 1 | | | | |
| 332 | | | 1 | | | |
| 333 | | 1 | | | | |
| 335 | | 1 | | | | |
| 336 | | | 1 | | | |
| 344 | 1 | | | | | |
| 347 | | 1 | | | | |
| 419 | | 1 | | | | |
| 440 | | | | 1 | | |
| 483 | | 1 | | | | |
| 505 | | 1 | | | | |
| 537 | | | | 1 | | |
| 573 | | 1 | | | | |
| 603 | | | 1 | | | |
| 605 | | | 1 | | | |
| 607 | | | 1 | | | |
| 639 | | 1 | | | | |

| Apt. # | 1 BR | 2 BR | 3 BR | 4 BR | 5 BR | Total # of Scattered Site Vacancies to be Filled |
|-----------------------|------|------|------|------|------|---|
| 755 | | | 1 | | | |
| 802 | | | | | 1 | |
| 843 | | | | 1 | | |
| 937 | 1 | | | | | |
| <hr/> | | | | | | |
| TOTAL BY APT. SIZE | 2 | 14 | 8 | 3 | 1 | 28 |
| <hr/> | | | | | | |

In any relocation effort some tenants will be reluctant to move. The Authority would have to pool all its resources to accomplish a smooth relocation program.

The first incentive is to rehab apartments selected for transfers in a manner that sells the apartment to the family being moved.

Secondly, incentives - possibly rent reductions - for the first year may be applicable.

Thirdly, the feeling that they are permanently being uprooted may be altered if a waiting list is developed; making these families eligible to move back to their old addresses when and if they are redeveloped.

Fourthly, the Legal Department and the Authority will enforce new and stronger policies and procedures (attached). This would buttress the local managements efforts to relocate tenants who just plain refuse to move.

Some capital improvements are scheduled for "D" St. in the near

future:

1. 604 Apartments have been selected for bathroom renovation (See Exhibit C) (Salamando Corporation Contracted through the Modernization Department- BHA)
2. Heating System renovations are presently being designed by an engineering firm (Linnehan Engineering) contracted through the Modernization Department of BHA.

These are the types of improvements that will ultimately require adjusting if a relocation effort is made.

To fill the remaining scattered site vacancies and cope with the normal turnover of apartments, the development must become marketable. Tenant Selection, in its screening process, would have to lend to local development a hand. Possibly films of typical good addresses could be shown to prospective tenants.

Phase III

After relocation has taken place, the Authority has several options which may be implemented.

Option I

Demolish several or all vacated buildings or addresses. There are pros and cons to this approach.

Pros:

- A. Unsightly vacant buildings and addresses would be eliminated.
- B. Density is reduced.
- C. Badly needed parking space would be more readily available.
- D. Options for solid waste removal are expanded by the position of dumpsters, possibility of compactors, and the potential for solid waste heating supplements.

Cons

A. If the market changes to a point where more people are seeking out "D" St. for housing, we will have destroyed structurally sound buildings which have a potential for rehabilitation and housing.

Option II

Secure and mothball all vacant buildings and addresses, monitor and demand trends and determine selective rehabilitation where warranted.

Pros

A. ^{If} Buildings or addresses are not destroyed ~~are not destroyed~~ but are held in limbo, so to speak, awaiting funding, rehabilitation, and tenants, *then changing trends could be addressed.*

Cons

- A. Vacant buildings will still lend a negative characteristic to the development and its marketability.
- B. Density is not reduced.
- C. Parking spaces ~~will~~ still remains a problem.
- D. Dumpsters ~~will~~ still be located close to apartments.

Option III

A portion of the development's addresses would be torn down and a portion will be kept secure.

Pros *(limited)*

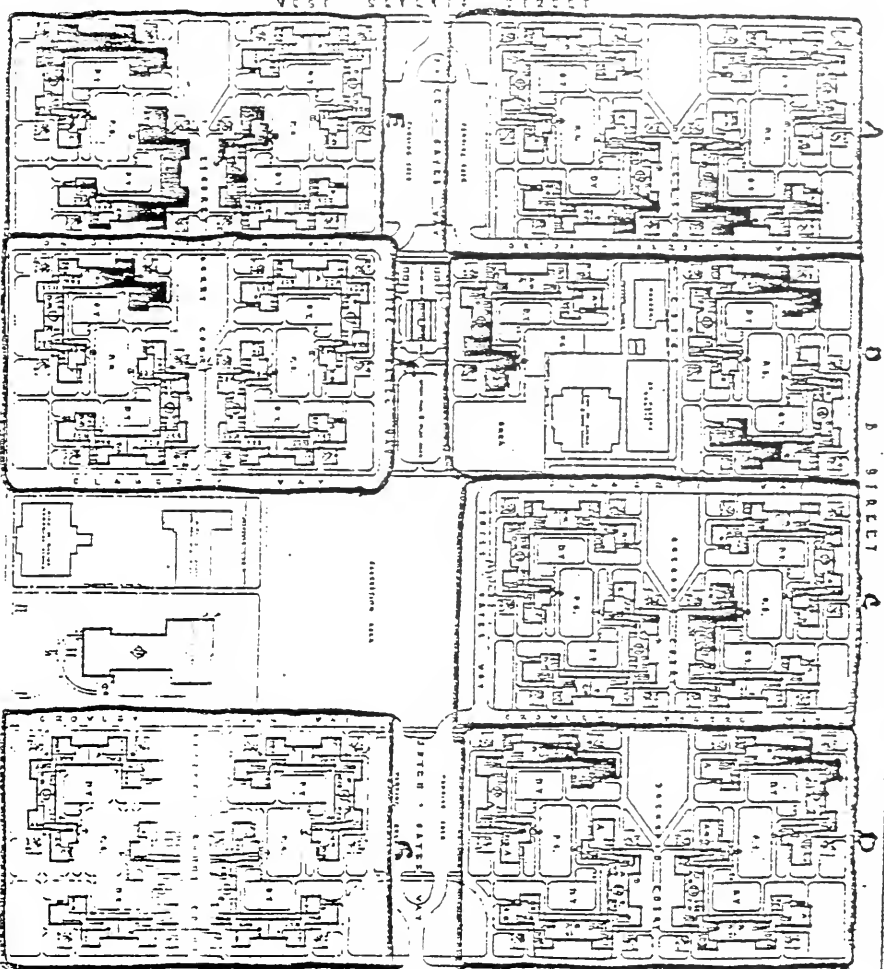
- A. Some of the troublesome unsightly addresses will be removed.
- B. Density will be decreased.
- C. Parking will become available.
- D. Solid waste options are made more viable.
- E. Trend change could be addressed if necessary.

F. The Authority and the community can monitor its' success's or failures.

Cons

- A. Vacant buildings and addresses will still exist but will be reduced.
- B. Security problems will exist but could be addressed if the security plan is implemented.
- C. Loss of structures.

I feel that the "D" St. development's size is one of its major problems. The development could easily be reduced to approximately (700) to (750) units making it more manageable. I don't feel that an overwhelming change in the near future will generate the kind of resurgence in demand for apartments to fill 925 units. Therefore, I recommend Option '1'.



| LOT | AREA | PERMITS | REMARKS |
|-----|------|---------|---------|
| 1 | 1.00 | 1.00 | 1.00 |
| 2 | 1.00 | 1.00 | 1.00 |
| 3 | 1.00 | 1.00 | 1.00 |
| 4 | 1.00 | 1.00 | 1.00 |
| 5 | 1.00 | 1.00 | 1.00 |
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| 12 | 1.00 | 1.00 | 1.00 |
| 13 | 1.00 | 1.00 | 1.00 |
| 14 | 1.00 | 1.00 | 1.00 |
| 15 | 1.00 | 1.00 | 1.00 |
| 16 | 1.00 | 1.00 | 1.00 |
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VETERANS HOUSING DEVELOPMENT - BOSTON - 200-1

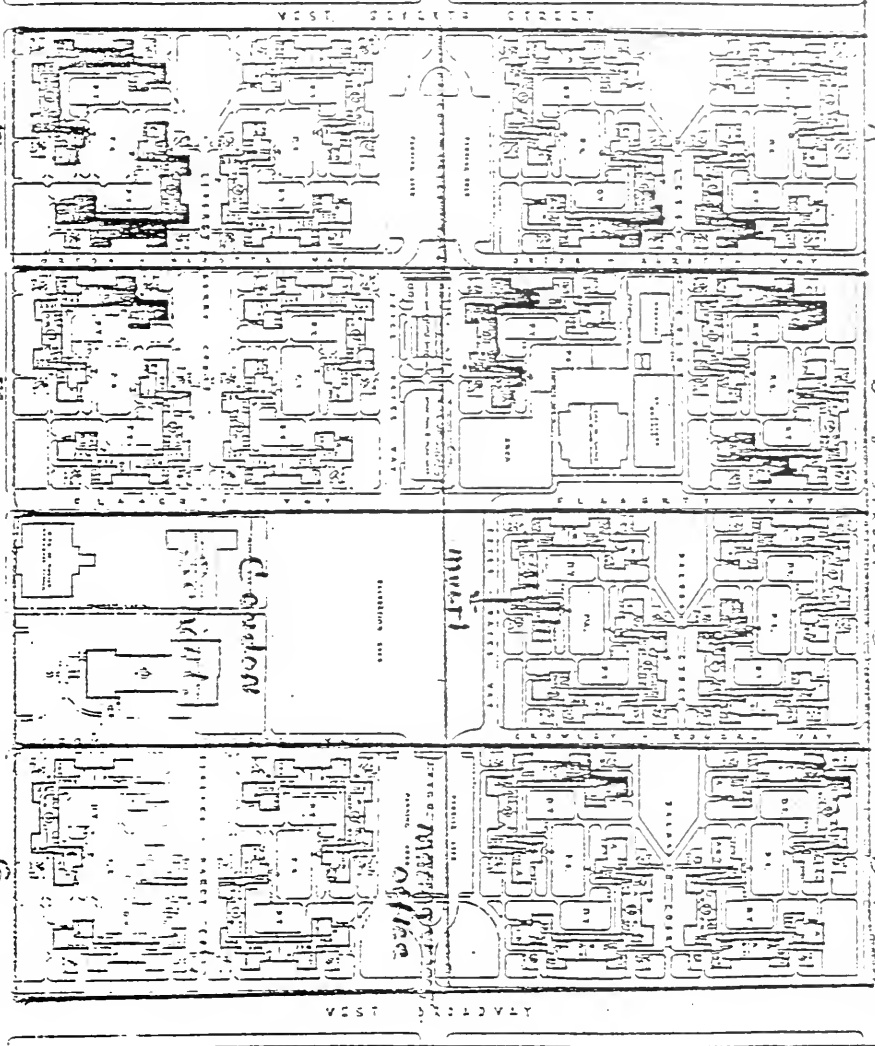
SOUTH BOSTON DISTRICT

Map of the Veterans Housing Development in Boston, showing the present vacant addresses and village alignment.

Map of the Veterans Housing Development in Boston, showing the present vacant addresses and village alignment.

Map of the Veterans Housing Development in Boston, showing the present vacant addresses and village alignment.

PORT RELATIONS



VETERANS HOUSING DEVELOPMENT BOSTON 200-1

SOUTH BOSTON DISTRICT

M. A. Piper Company Architects



| PROPERTY | | OWNER | | RENTAL | |
|----------|-----|-------|-----|--------|-----|
| 1 | 100 | 100 | 100 | 100 | 100 |
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MAINTENANCE

A. First and foremost the development and its tenants are in bad need of an influx of crafts and labor. In the past, an inadequate labor pool had added to "D" Street's plight. If we are to satisfy the concerns of tenants and rehabilitate "d" Street, then we must meet specific goals. Goals that not only upgrade the present conditions, but looks beyond toward more efficient, cost effective, stabilization and modernization betterments.

1. Presently, the following crafts are supplied to the development from the District:

One (1) Plumber

One (1) Carpenter

One (1) Glazier

One half (1/2) Plasterer

One (1) Painter

One half (1/2) Steamfitter

One twentieth (1/20) Cement Mason

One third (1/3) Attendance man

Eight (8) Laborers

Total District Staffing (13 1/2)

2. Presently the following crafts are supplied to the development by the pilot:

One (1) Plumber

One (1) Carpenter

One (1) Electrician

Total Supplemental Staff (3)

3. Present Staffing Level:

Eight (8) Laborers

Eight and one half (8 1/2) Crafts

Total: (16 1/2)

B. REASONS FOR MAINTENANCE CREWProposed Goals

1. Occupied apartment painting
2. Occupied apartment tiling (floor)
3. Deferred maintenance, faucet repair, glazing, electrical carpentry, etc.
- 4a. Clean out all apartments and basements. This would require four (4) additional laborers and a 1 ton open truck (approximate cost \$12,000 to \$14,000). The present truck has had it! Additionally the rental of an aerial bucket truck should be allowed ^{in full} budgetarily for 8 to 12 weeks. (This would enable us to properly maintain secured apartment^s and security gloves .
- 4b. Scattered site vacancies can be secured. Those apartments 2nd floor and above can easily be secured in accordance with ^{the} BHA recommended security plan attached. This could be completed the day a vacancy pops up.
 If the securing of vacant addresses (see plot Plan A) cannot be manifested ^{by} the contract, then given ample materials and vehicles the additional staffing could make this a high priority. I must advise that an attempt at securing buildings was made via a rehab crew paid for out of pilot funds and operated out of PD&M last year. This attempt was unsuccessful.

4c. Divide the development into three (3) sections for maintenance purposes solely. Each section would have it's own basic maintenance staff. For example each section would be assigned (1) plumber, (2) brush painters, (1) carpenter, (1/3) electrician, ~~2~~ (1/3) plasterer, (1/3) glazier, (1/3) steamfitter, and additional specialty crafts from the district and central maintenance.

In this manner, work is spread out equally. Crafts will be assigned areas that they are held responsible to address and maintain.

Resident Management Trainees and the GHM and Maintenance Supervisor will know where a craft is and what he's doing at all times.

5a. The recommended additional staffing levels required to perform specific maintenance tasks outlined further in this report are:

| | |
|---|---------------------|
| One (1) Painter Foreman | \$32,489.60 |
| One (1) Laborer Foreman | 24,606.40 |
| Five (5) Laborers | 112,632.00 |
| Six (6) Painter(who can spray and brush) | 176,219.60 |
| Four (4) Carpenters | 113,900.80 |
| Four (4) Plumbers | 132,080.00 |
| One (1) Glazier | 27,680.00 |
| One (1) Plasterer | 28,460.00 |
| One (1) Steamfitter | 31,740.00 |
| One (1) Welder | 23,475.20 |
| One (1) Bricklayer | <u>23,060.00</u> |
| Total additional staff (26) | <u>\$736,343.60</u> |

These figures represent one year contract, no sick leave or benefits are paid. When a man is out he does not get paid!

Again I want to note that this request is above and beyond present staffing levels.

5b. Presently there are two (2) plumbers at "D" Street. One (1) District and one (1) supplemental plumber. Two plumbers are simply not adequate to meet all the needs of the development. Consistently the local management must pull them off of routine maintenance and deal with emergencies, or normal apartment turnover.

If the proposed request for four(4) additional plumbers is granted the following will occur:

1. All "Regular Service Calls" will be addressed within a forty-eight (48) hour period from the time a work order is called in. This would include leaking faucets, flushometer repair, shower repair, toilet and drain stoppages, etc.
2. "Emergency Calls" or "Major Repairs" would be addressed as they occur. Preventative Maintenance would be a regular part of this program. (Main drain stoppages, leaking and/or broken pipes, dig-ups etc.)
3. "Scattered Site Vacancies" presently being inspected by village coordinators will all be rehabbed and filled in one year, given materials and staff are coordinated. There are (24) 1Br's, (46) 2 Br's, (16) 3 Br's, (5) 4 Br's and (12) 5 Br's, for a total of (93) scattered site vacancies.
4. "One-Year Vacancy Turnover" would also be inspected, rehabbed and rented within the same year.
5. Every basement will be re-piped with plastic pipe to above grade levels.

5c. Carpenters (Four (4))

Presently there are two (2) carpenters working at "D" Street. One (1) District and one (1) supplemental carpenter. If four (4) carpenters were hired the following would occur:

1. Completely vacant addressed would be secured according to the Housing Authority's recommended securing program. (Copy attached). This would include plating, boarding, penthouse doors, entrance doors including at least one (1) basement door and all basement and hallway windows. This badly needed program is high on the tenants list of priorities.

We feel that we could succeed if materials were readily available, the proper tools were provided, strong supervision from all levels accountability was enforced, and proper security and tenant liason were present. (I might add no moth-balling will last if vandals are given time to work on the measures.)

2. "Regular Service Calls" would improve: The repair of locks and supplying of keys, which occupies 50% of both carpenters time. (Tenants at "d" Street are constantly installing personal locks cylinders. Repair and replace window sash, repair kitchen cabinet doors hinges etc., repair mailboxes, entrance and penthouse doors, locks, door closers etc.

3. "Emergency Calls" and "Preventative Maintenance"

It is important that doors especially entrance and penthouse doors, get repairs immediately to insure hallway security. This would include door closer repairs, locks, welding etc.

4. "Scattered Site Vacancies" and "Normal Apartment Turnover"

All vacancies would be addressed-normal turnover being the priority and scattered sites rehab being second.

5. "Floor Tiling": This is a special, urgently needed program. Occupied units, particularly in the kitchen areas, are in bad need of tiling. All carpenters would address this problem. A targeted goal would be roughly One Hundred (100) apartments, within a one year period (this may be an arbitrary conservative number).

5d. Glazing: Presently there are two and one half (2 1/2) glaziers within the District who deal with roughly 2600 occupied units in the South Boston District. The "d" Street development receives on a scheduled basis its appropriate share.

1. "Regular Service Calls": All regular service calls would be addressed.
2. "Scattered Site Rehab" and "Normal Turnover" apartments would be addressed on a scheduled basis within one (1) year.

5e. Plastering: The plastering priority will be "Scattered Site Rehab" and Normal Turnover" apartments, again all would be addressed.

5f. Electrician: There is a need for a full-time electrician at "D" Street power failures, pulling wire, globe & canopy light repair and fencing basement all add to the development needs.

5g. Steamfitter:

1. "Regular Service Calls"
Address the annual maintenance of the distribution system: repair and use scheduled preventative maintenance on return pumps, clean and back valves, trap replacement, and work on the heating system at the Condon School.
2. "Scattered Site Rehab" and "Normal Turnover Apartments"
Changing traps and replacing convectors where necessary.

- 5h. Painter: There is a strong tenant painting program at the "D" Street development. This program became necessary because of the lack of craftsmen.
1. "Routine Service Calls": a major portion will be addressed within one (1) year.
 2. "Scatter Site" and "Normal Turnover Apartments": All!
- 5i. Welder: Primary function is securing units and doors. Removing old fencing etc.
- 5j. Bricklayer: A bricklayer is required for sealing basement doors, bricking up basement - repipe jobs, bricking up hallway stairwells, incinerators, and entrance door facia presently deteriorating.
- 5k. Laborers: To aid in all aspects of the maintenance plan.
- 6a. Incorporated in this maintenance plan is the selection of staff. (All crafts hired will be interviewed by the District Director, General Housing Manager, Maintenance/Contract Supervisor and a Village Coordinator). Staff will be hired on 30-day contracts. Evaluations will be made jointly by the interviewers.
- 6b. The development will be broken up into thirds. Each third will have a nucleus of staff, consisting of:
- (1) Plumber
 - (1) Carpenter
 - (2) Painters
 - (1/3) Plasterers
 - (4) Laborers
 - (1/3) Electrician
 - (1/3) Steamfitter
 - (1/3) Bricklayer
 - (1/3) Glazier

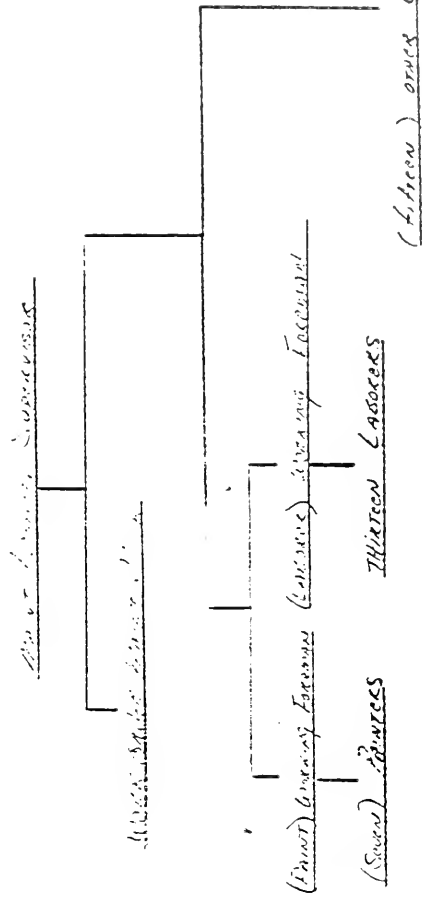
Additional staff from the district⁶¹ will supplement development needs.

- 6c. Material will be in place prior to the hiring of various crafts relative to projected goals. EOCD and the BHA must allow for variances in its current procurement programs to speed up materials and safe warehousing.
- 6d. The creation of a working foremen (see organizational chart attached) will be held accountable for his crew and provide leadership and incentive as well. Their ability to get the job done as well as their men will be scrutinized by the Maintenance/Contract Supervisor, Work Order Clerk, General Housing Manager, Asst. Housing Manager, Resident Management Trainees and the District Director.
- 6e. Monthly performance evaluations of each employee will be submitted to the District Director by the General Housing Manager. It will include quantity and quality of apartment rehab, security, quality of workmanship, and date of inspection by the GHM.
- 6f. The Maintenance/Contract Supervisor will have strong supervisory, planning and construction background. The Supervisor must evidence a history of ability to maintain strong interaction with security personnel, task force persons and Resident Employees. He/She will have demonstrated ability to motivate, direct and guide his/her staff for maximum productivity. It will be his/her responsibility to train tenant workers in craft evaluation by training the tenant workers (Village Coordinators to start) the foundation of tenant training programs has begun. Presently crafts must be licensed, therefore, they are supplied by various unions. This would give some tenants some exposure to residents; whether it be managerial or a working knowledge of a variety of trades it would become useful in the future!
- 6g. Re-evaluation of staffing requirements and progress will be accomplished every two (2) months.

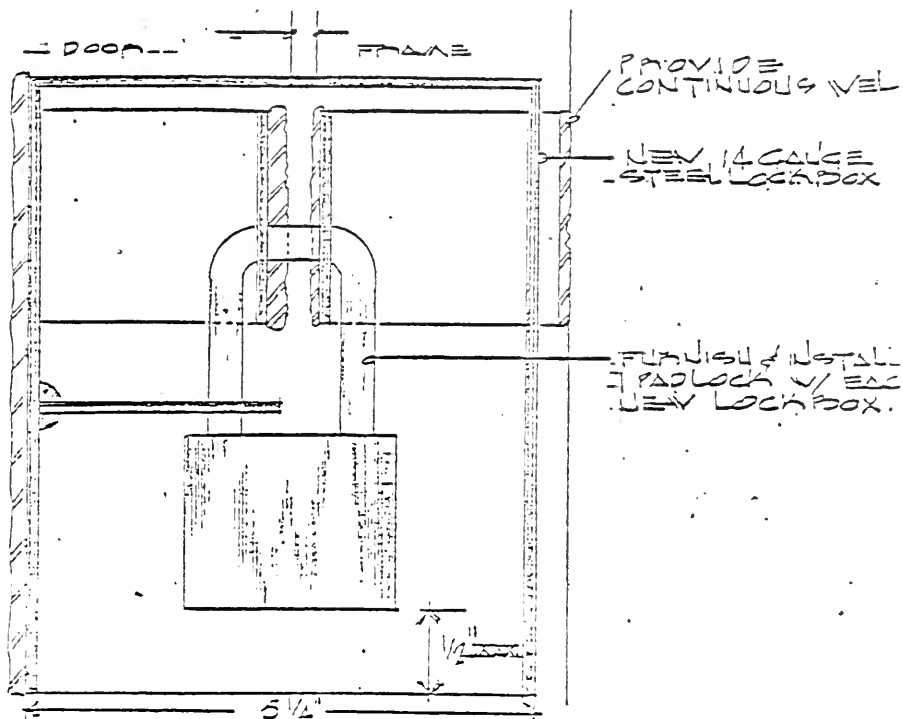
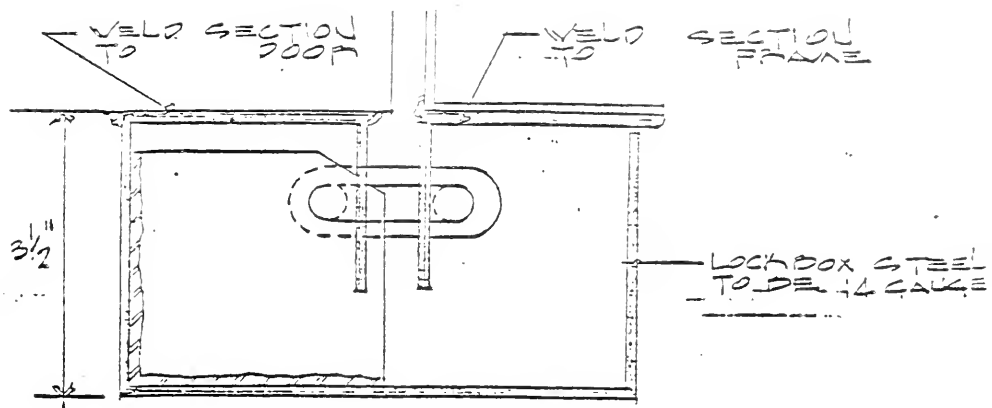
7. PREVENTIVE MAINTENANCE

1. The heating system must be approached meticulously. This would include a steamfitter to address the heating plant, the condensate pumps, recirculating pumps, valves, and traps.
2. Doors, closets, locks, and the securing of vacant apartments during rehab are some of the preventative maintenance which need addressing.
(Carpentry)
3. Roof repair contractors to insure watch integrity.
4. Plumbing evaluations by building reported in writing with recommendations from the manager via his staff.
5. Painting of occupied units on a 5 year cycle.

Management Department and Chart



(Securing Program)



PADLOCK BOX

7

Tack Weld Protector
Plate To Door Casing

Door Casing

Protector plate.
1/4" thick mild steel
5 in x 5 in w/ 3/4 in. flange.
Plate to be bolted thru
the existing lock hole.

Typical Apartment Door

Existing plate

1/4" thick mild steel
5 in x 5 in w/ 3/4 in. flange

Door NOT

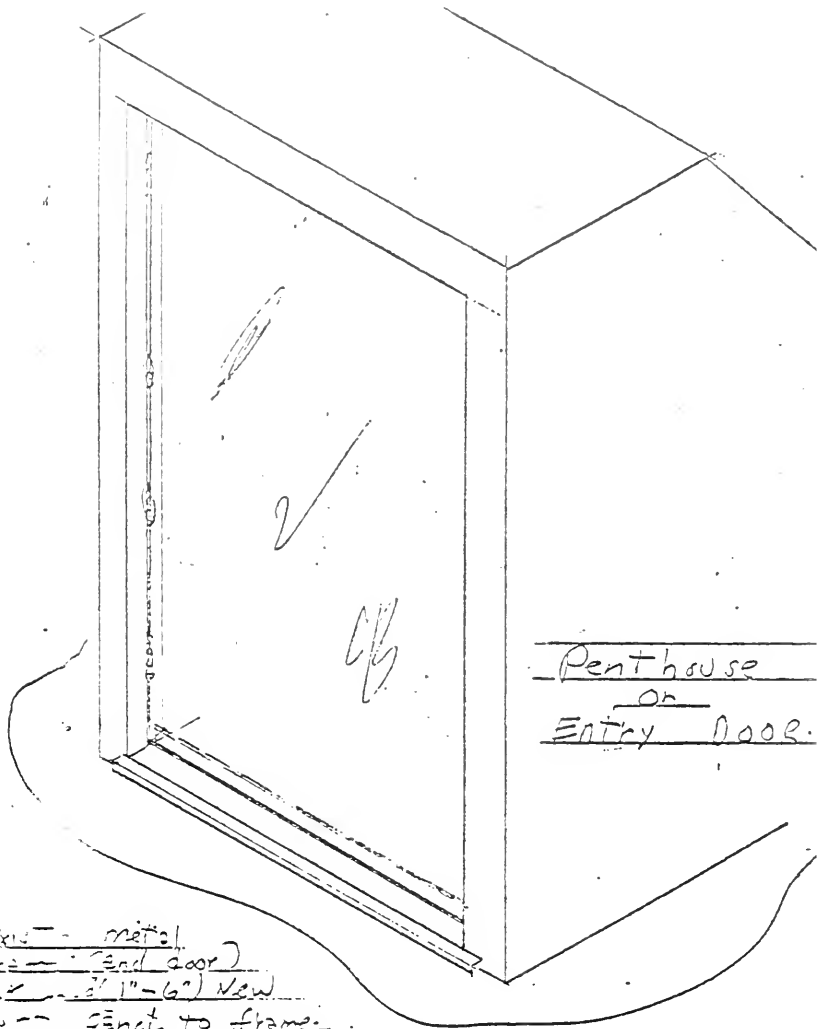
1/4" threaded rod welded to plate

Protector Plate To be Tack
Welded To Door Casing.

Door

Door Casing

Apartment Door Protector Plate C



Penthouse
or
Entry Door.

Ext - metal
Frame (and door)
Sec - 3" x 1" - 6" New
Sec - Sash to frame.

119209
metal cover

caulk...
all
round

2" x 2" x 1/4" angle along bottom
of metal Security Panel
Attach with bottom of Panel
to the angle.

Section of door

Security Door Panel 5

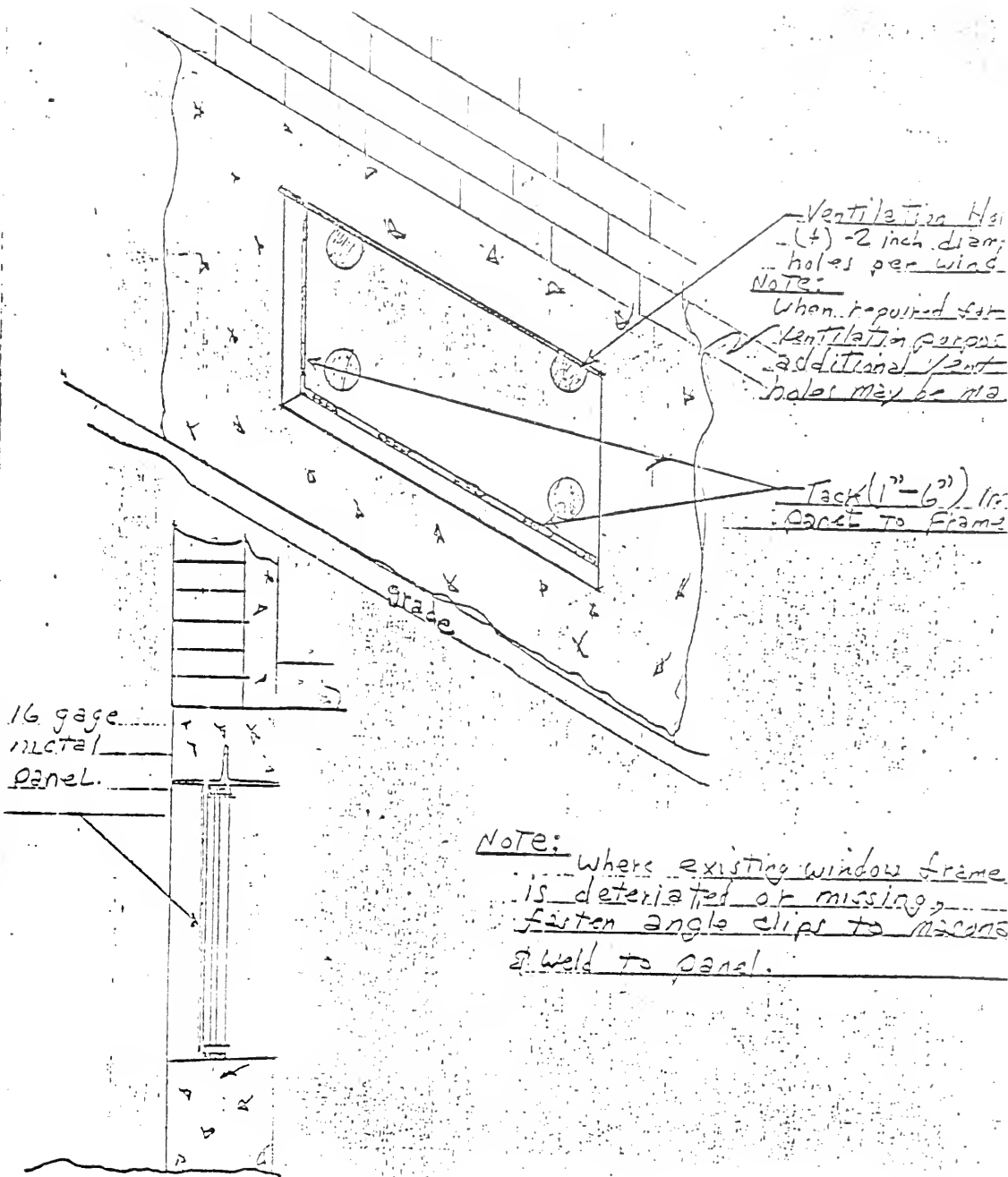
Test wall
Dis. To be
Removal

new
lock
Draw

Basement Door:

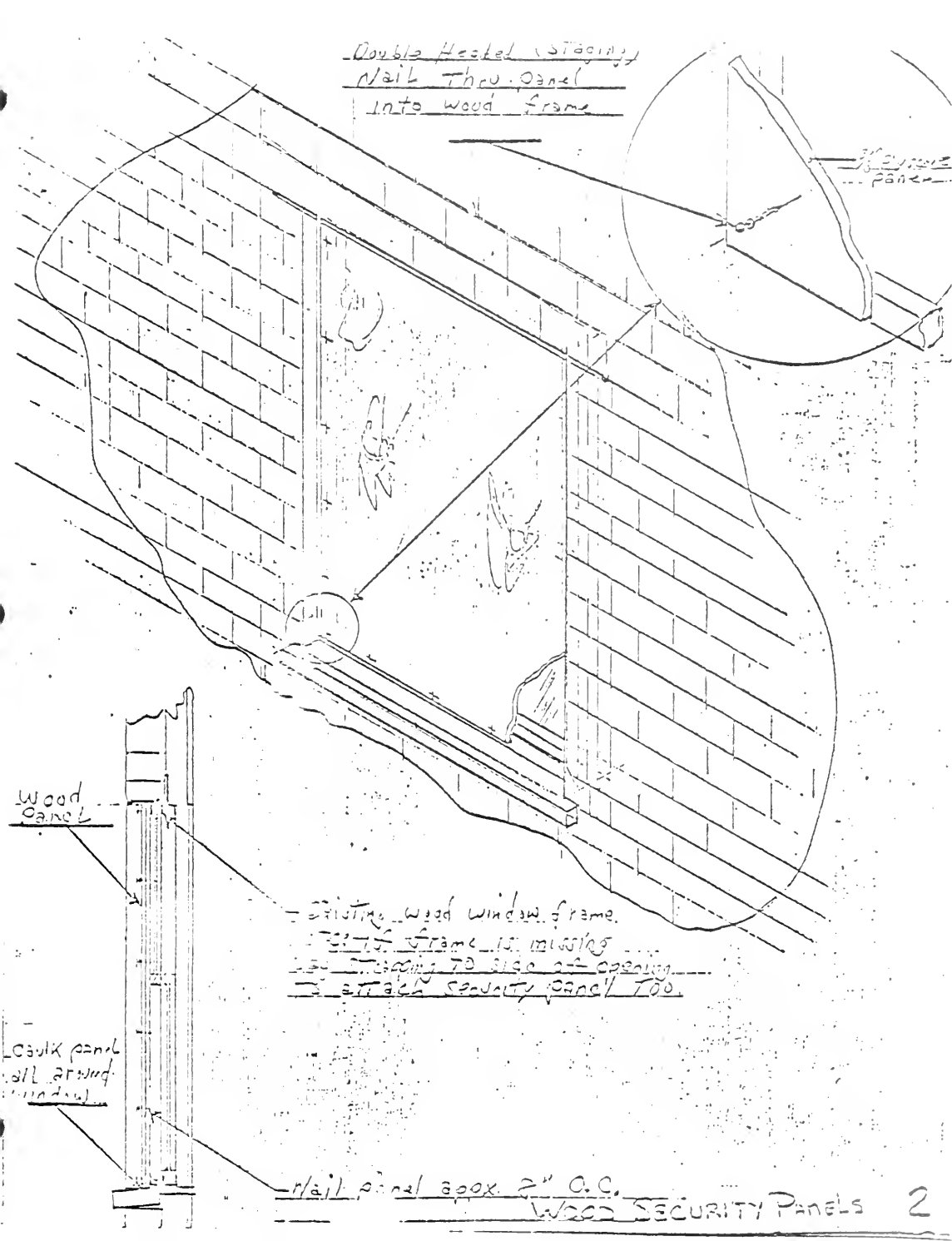
this door to be metal
w/ metal frame - for which
install new door to replace
any existing wood door.

Basement (operating) Security Door - 17



Section C Window

Double Hatched (staging)
Nail Thru Panel
into wood frame



Double Hatched (staging)
Nail Thru Panel
into wood frame

Wood Panel

Existing wood window frame

Existing frame is missing

Need to replace with security panel too

attach security panel too

Double panel
nail around window

Nail panel approx. 2" O.C.

WOOD SECURITY PANELS

Toggle
metal
cover

Save/K
all
around

1/2" Lumber cross pieces
1/2" threaded rod (Ship. loose)

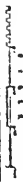
Window in open position
Note: Lumber cross pieces (4)
1/2" threaded rod will have to be removed
to allow rod to pass thru.

Metal cover joint -
Whether window dimension exceed
width of steel panel can be
made in two (2) sections & welded
(Tack) together.

1/2" DIA. NOT Tack weld
to metal cover
4 Place Per Panel.

Metal Security Panels

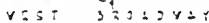
VII ATTACHEMENTS



SOLUTION POSITION DISRICT

McAuley, George W.

[illegible]

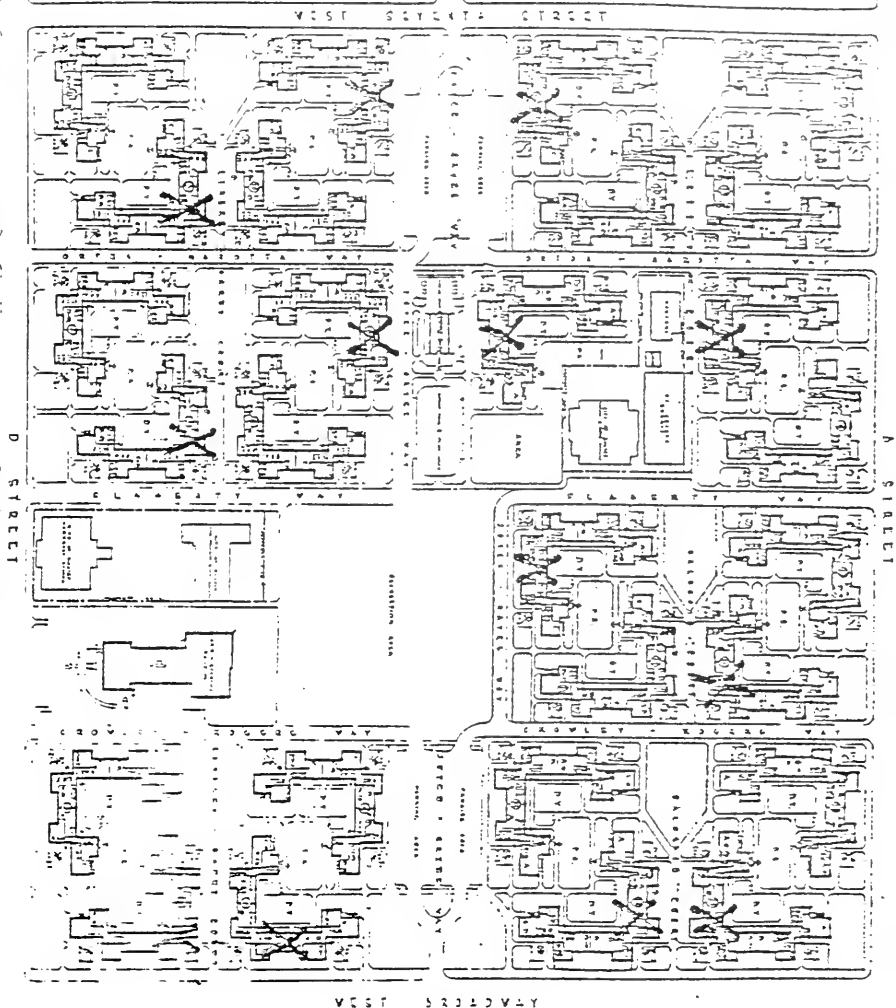


VETERANS • HOUSING • DEVELOPMENT • BOSTON • 200-1

SQUITH BOSTON DISTRICT

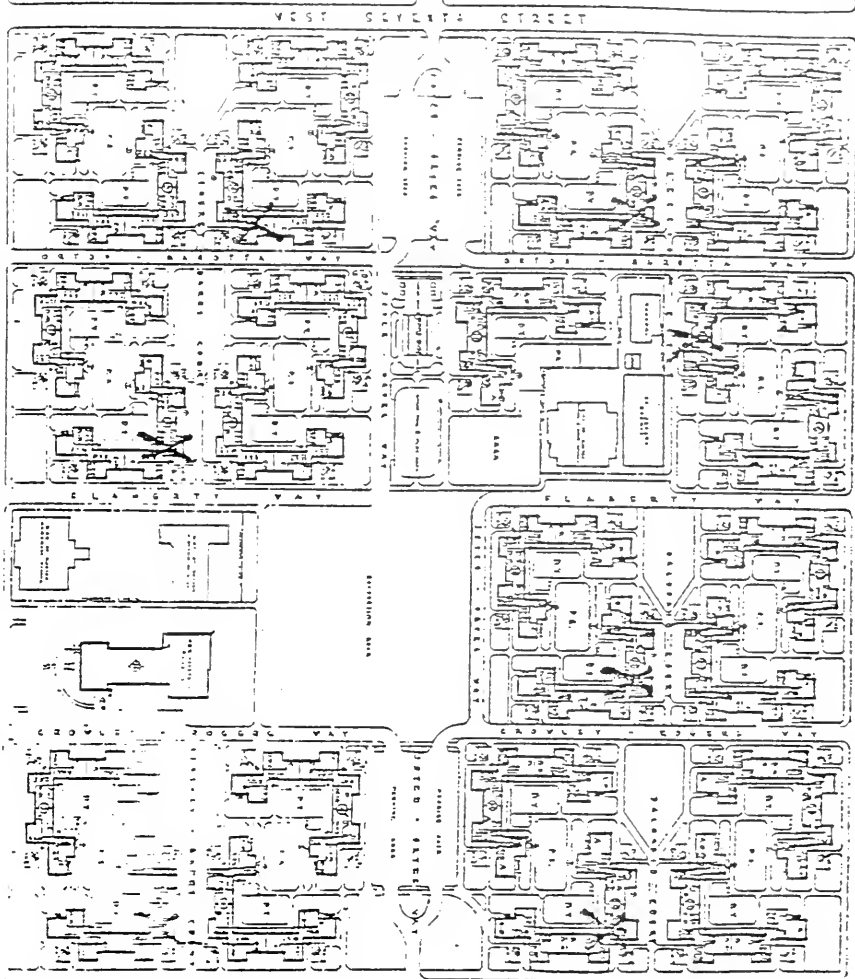
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VETERANS HOUSING DEVELOPMENT - BOSTON - 200-1
SOUTH BOSTON DISTRICT
New England Company, Inc., Architects



| NO. | DESCRIPTION | AMOUNT | DATE | REMARKS |
|-----|-------------|--------|--------|----------|
| 1 | RECEIVED | 100.00 | 1/1/50 | INITIALS |
| 2 | PAID | 100.00 | 1/1/50 | INITIALS |
| 3 | RECEIVED | 100.00 | 1/1/50 | INITIALS |
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TRANSITANCE LOCATIONS



VETERANS HOUSING DEVELOPMENT - BOSTON - 200-1

SOUTH BOSTON DISTRICT

J. A. S. Co. - Boston - 1940

1940

| NO. | NAME | ADDRESS | DATE | STATUS | REMARKS |
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SOUTH BOSTON DISTRICT

NAME _____

4-10-10

1. **Electricity**
 2. **Oil**
 3. **Gas**
 4. **Water**
 5. **Coal**
 6. **Iron**
 7. **Steel**
 8. **Aluminum**
 9. **Copper**
 10. **Lead**
 11. **Zinc**
 12. **Nickel**
 13. **Silver**
 14. **Gold**
 15. **Platinum**
 16. **Palladium**
 17. **Rhodium**
 18. **Iridium**
 19. **Osmium**
 20. **Pt**
 21. **Ag**
 22. **Au**
 23. **Fe**
 24. **Al**
 25. **Cu**
 26. **Pb**
 27. **Zn**
 28. **Ni**
 29. **Co**
 30. **Cr**
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 34. **Ca**
 35. **Mg**
 36. **S**
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 66. **Cf**
 67. **Es**
 68. **Fm**
 69. **Md**
 70. **No**
 71. **Lr**
 72. **Y**
 73. **Sc**
 74. **Ti**
 75. **V**
 76. **Cr**
 77. **Mn**
 78. **Fe**
 79. **Co**
 80. **Ni**
 81. **Cu**
 82. **Zn**
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 88. **Kr**
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 94. **Mo**
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 179. **Sc**
 180. **Ti**
 181. **V**
 182. **Cr**
 183. **Mn**
 184. **Fe**
 185. **Co**
 186. **Ni**
 187. **Cu**
 188. **Zn**
 189. **Ga**
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 192. **Se**
 193. **Br**
 194. **Kr**
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 198. **Zr**
 199. **Nb**
 200. **Mo**
 201. **Tc**
 202. **Ru**
 203. **Rh**
 204. **Pd**
 205. **Ag**
 206. **Cd**
 207. **In**
 208. **Sn**
 209. **Pb**
 210. **Bi**
 211. **Po**
 212. **At**
 213. **Rn**
 214. **Fr**
 215. **Ra**
 216. **Ac**
 217. **Th**
 218. **Pa**
 219. **U**
 220. **Np**
 221. **Pu**
 222. **Am**
 223. **Cm**
 224. **Bk**
 225. **Cf**
 226. **Es**
 227. **Fm**
 228. **Md**
 229. **No**
 230. **Lr**
 231. **Y**
 232. **Sc**
 233. **Ti**
 234. **V**
 235. **Cr**
 236. **Mn**
 237. **Fe**
 238. **Co**
 239. **Ni**
 240. **Cu**
 241. **Zn**
 242. **Ga**
 243. **Ge**
 244. **As**
 245. **Se**
 246. **Br**
 247. **Kr**
 248. **Rb**
 249. **Sr**
 250. **Y**
 251. **Zr**
 252. **Nb**
 253. **Mo**
 254. **Tc**
 255. **Ru**
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 260. **In**
 261. **Sn**
 262. **Pb**
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 264. <

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WEST BROADWAY MULTI-SERVICE CENTER
WEST BROADWAY TASK FORCE, INC.

62 JOYCE-HAYES WAY
SOUTH BOSTON, MASS. 02127

COMMUNITY ORGANIZATION
AND TENANT SERVICES
269-7477

YOUTH SERVICES
269-7473

March 14, 1980 (revised per management list
as of 3-31-80)
Bathroom Modernization Ordering

| BLDG NO. | VILLAGE | ADDRESS | VACANCIES | | TOTAL COST |
|----------|---------|------------------------|-----------|------------------|------------|
| 1 | | 299 W. Broadway | 0 | | 12 |
| 1 | G | 275 W. Broadway | 1 | 22* | 11 |
| 1 | | 111 Linskey Barry Ct. | 0 | | 12 |
| 2 | | 112 Linskey Barry Ct. | 0 | | 12 |
| 2 | G | 251 W. Broadway | 0 | | 12 |
| 2 | | 227 W. Broadway | 0 | | 12 |
| 3 | | 168 Crowley Rogers | 0 | | 12 |
| 3 | G | 256 D Street | 0 | | 12 |
| 3 | | 248 D Street | 0 | | 12 |
| 4 | | 109 Joyce Hayes Way | 0 | | 12 |
| 4 | G | 108 Joyce Hayes Way | 0 | | 12 |
| 4 | | 132 Crowley Rogers Way | 0 | | 12 |
| 5 | | 173 Flaherty Way | 1 | 161 | 11 |
| 5 | F | 173 Flaherty Way | 2 | 159, 161 | 10 |
| 5 | | 10 Linskey Barry Way | 1 | 172 | 11 |
| 6 | | 10 Linskey Barry Way | 1 | 183 | 11 |
| 6 | F | 125 Flaherty Way | 0 | | 12 |
| 6 | | 111 Flaherty Way | 2 | 206, 212 | 20 |
| 7 | | 171 "D" Street | 0 | | 12 |
| 7 | F | 155 "D" Street | 1 | 241 ¹ | 11 |
| 8 | | 17 Joyce Hayes Way | 3 | 259, 260, 263 | 9 |
| 8 | F | 114 Orton Marotta Way | 1 | 275 | 11 |
| 8 | | 113 Orton Marotta Way | 0 | | 12 |
| 10 | | 113 Orton Marotta Way | 2 | 344, 347 | 10 |
| 10 | 3 | 113 Orton Marotta Way | 0 | | 12 |
| 12 | | One Joyce Hayes Way | 0 | | 12 |
| 12 | 3 | 62 West 7th Street | 3 | 413, 416, 419 | 9 |
| 12 | | 64 West 7th Street | 0 | | 12 |
| 13 | | 2 Joyce Hayes Way | 0 | | 12 |
| 13 | A | 28 West 7th Street | 3 | 437, 439, 440 | 9 |
| 13 | | 40 West 7th Street | 1 | 445, | 10 |

| <u>BLDG NO.</u> | <u>VILLAGE</u> | <u>ADDRESS</u> | <u>VACANCIES</u> | <u>TOTAL</u> |
|-----------------|----------------|---------------------|----------------------|--------------|
| 14 | A | 11 "B" Street | 4 471, 473, 479, 477 | 8 |
| 14 | | 4 West 7th Street | 2 483, 484 | 10 |
| 14 | | 16 W. 7th Street | 1 502 | 11 |
| 15 | A | 4 Dalessio Court | 2 505, 512 | 10 |
| 15 | | 7 Orton Marotta Way | 4 532, 536, 537, 531 | 8 |
| 16 | A | 3 Dalessio Ct. | 3 570, 573, 574 | 9 |
| 16 | | 79 Orton Marotta | 2 545, 549 | 10 |
| 18 | B | 35 "B" Street | 1 648 | 11 |
| 18 | | 47 "B" Street | 0 | 12 |
| 19 | C | 71 "B" Street | 4 655, 656, 657, 658 | 3 |
| 19 | | 59 "B" Street | 4 662, 663, 667, 671 | 6 |
| 19 | | 14 Flaherty Way | 0 | 12 |
| 20 | C | 50 Flaherty Way | 1 680 | 11 |
| 20 | | 74 Flaherty Way | 1 701* | 11 |
| 21 | C | One Crowley Rogers | 1 755 | 11 |
| 21 | | 25 Crowley Rogers | 1 756 | 11 |
| 22 | C | 73 Crowley Rogers | 1 763* | 11 |
| 22 | | 49 Crowley Rogers | 2 770*, 779* | 10 |
| 22 | | 53 Dalessio Ct. | 3 782*, 790, 786* | 9 |
| 24 | D | 77 Crowley Rogers | 3 843, 852, 852* | 9 |
| 24 | | 110 Joyce Hayes | 0 | 12 |
| 25 | D | 165 W. Broadway | 2 879*, 888* | 10 |
| 25 | | 161 W. Broadway | 0 | 12 |
| 25 | | 112 Dalessio Ct. | 0 | 12 |
| 26 | D | 111 Dalessio Ct. | 0 | 12 |
| 26 | | 139 W. Broadway | 3 913, 914, 819* | 9 |
| 26 | | 107 W. Broadway | 0 | 12 |
| 23 | D | 55 "B" Street | 2 801, 802 | 10 |
| 23 | | 11 Crowley Rogers | 4 819, 826, 827, 828 | 8 |
| 27 | B | 66 Orton Marotta | 2 827, 828 | 10 |
| 27 | | 90 Orton Marotta | 5 937, 943 | 10 |
| 17 | B | 30 Orton Marotta | 5 949, 950, 955, | 7 |
| 17 | | 40 Dalessio Ct. | 4 956, 958 | 8 |
| 11 | B | 150 "D" Street | 4 589, 590, 592, 593 | 7 |
| 9 | | 187 Orton Marotta | 5 603, 605, 606, | 7 |
| 10 | E | 4 Linskey Barry Ct. | 6 607, 610, | 11 |
| | | | 1 386 | 11 |
| 9 | E | 187 Orton Marotta | 4 291, 292, 295, 297 | 8 |
| 10 | | 4 Linskey Barry Ct. | 6 328, 331, 332, | 6 |
| | | | 333, 335, 336 | 6 |

| <u>BLDG NO.</u> | <u>VILLAGE</u> | <u>ADDRESS</u> | <u>VACANCIES</u> | <u>TOTAL C.M.</u> |
|-----------------|----------------|---------------------|---------------------------------------|-------------------|
| 10 | A | 55 Orton Marotta Wa | 7 553,554, 555,556,557, 560,561 | 5 |

| | | | | |
|---|------------|---|--|------------|
| Total Non-mothballed/non-Multi | | | | <u>816</u> |
| Total Occupied (bathrooms incl. brkthrus) | <u>709</u> | A | | |
| Total Vacancies (3-31-80) | <u>92</u> | B | | |
| Total Agency/CETA no baths (listed below) | <u>15</u> | C | | |
| Total A,B,&C | | | | <u>816</u> |
| Total High Priority Bathrooms | <u>647</u> | D | | |
| Total Lower Priority Bathrooms | <u>62</u> | E | | |
| Total D & E = A | <u>709</u> | A | | |

- *a Welfare Office 241
- *b Village A&B Office 532
- *c Village C&D Office 782
- *d Labour Satellite 913&914
- *e CETA rehabbed bathrooms
701;770;773;783;786;819;
850;879;882 etc.

INITIAL CONTRACT FOR HIGH PRIORITY OCCUPIED BATHROOMS 647

Don Gillis, 4-15-80
Don Gillis, 4-15-80

VIII SUMMARY

What the "D" St. development needs most is a good shot in the arm. Improvements are most felt when a tenant sees long overdue repairs being made faster and at a high level of craftsmanship. Frustrations on the other hand take their highest toll when little or nothing occurs.

I believe that with the proper supervision, leadership, and adequate staffing, the development can begin to see improvement. To bring about any major positive strides, a new management team must be put in place. This means that a new manager and maintenance supervisor is needed. Agressive yet compassionate decisions have to be made to achieve the goals outlined in this proposal.

The tenant Task Force is an active group whose participation is anticipating radical changes in the development soon! In the past change has come slowly causing an incredible amount of anxiety. It's about time the Authority came through with positive change. The rewards of these efforts must begin and begin soon!

I plan to keep this "tenant involvement" at a fever pitch. The same committees will stay in place. Hopefully, the same tenant oriented services should be kept in place or improved wherever possible. Tenants will be more involved in the day to day operation of the development. They have been well trained in organization and how major capital improvement expenditures operate. The best quality in the "D" St.'s Task Force is its tenacity and its knowledge of the development as a whole.

For these reasons alternative forms of management should be considered somewhere in the not so far future; but first the development must be upgraded to avail working management systems.

The "D" St. development's image is going to have to change. For this reason the tenants and management are going to have to work hand in hand. Responsibility is going to have to rest with both. One is going to have to come through for the other. One is going to listen and help the other. If this happens "D" St.'s image will change.

In closing this is an opportunity that the development needs. There is very little theory in this proposal. It approaches not so popular areas, but again it is designed to deliver. Delivery that again is a long time overdue.

Mary Ruby

Revised grant seeks H.A. safer public housing 6/23/70

Mayor Kevin White is expected to file today with the City Council a revised Community Development Block Grant proposal which would budget nearly \$2 million for improved security programs in public housing and more than \$1 million for community-based human services programs.

Sources close to the CDBG deliberations say 75 percent of housing security funds would be funneled into the projects through a new police department security program designed to meet the needs of public housing tenants. The remainder of the fund earmarked for security would be channeled to tenant-administered public housing security programs with proven success records.

In addition to revised plans which include public housing and human services, the White administration plans to search for alternative funding sources for public housing other than CDBG funds for next year.

Already, however, at least one city councilor doesn't think that's

the way to go with the CDBG security funds. "I am deeply concerned about the potential for political patronage," said Councilor Raymond Flynn.

"Any proposed CDBG public housing compromise which does not provide for direct management and control by tenants or the Boston Housing Authority is totally inadequate and unacceptable."

Flynn also criticized the exclusion of hardware safety precautions such as security screens for elder developments, locks, window repairs and lighting from the CDBG compromise package which he said will "drastically reduce" the impact of any increased security patrols.

CDBG money in this year's initial proposal, which was defeated by the city council two weeks ago, made the improvement of the neighborhood business districts its top priority. CDBG money will mean \$26 million to Boston this year alone. The deadline for the application to the Department of Housing and Urban Development has passed but Boston has been granted an extension.

Handwritten notes and stamps:
- "RECEIVED" stamp
- "JUN 24 1970" stamp
- "CITY OF BOSTON" stamp
- "DEPT. OF HOUSING AND URBAN DEVELOPMENT" stamp

EXHIBIT 1c

FRANKLIN FIELD MANAGEMENT PLANS

DRAFT COPY ONLY

MANAGEMENT PLAN

AND

MAINTENANCE SUPPORT PROPOSAL

FOR

FRANKLIN FIELD DEVELOPMENT

(MASS. 200-11)

Prepared & Submitted by:

Wilbur S. Best
District Director
Boston Housing Authority
May 30, 1980

BOSTON HOUSING AUTHORITY

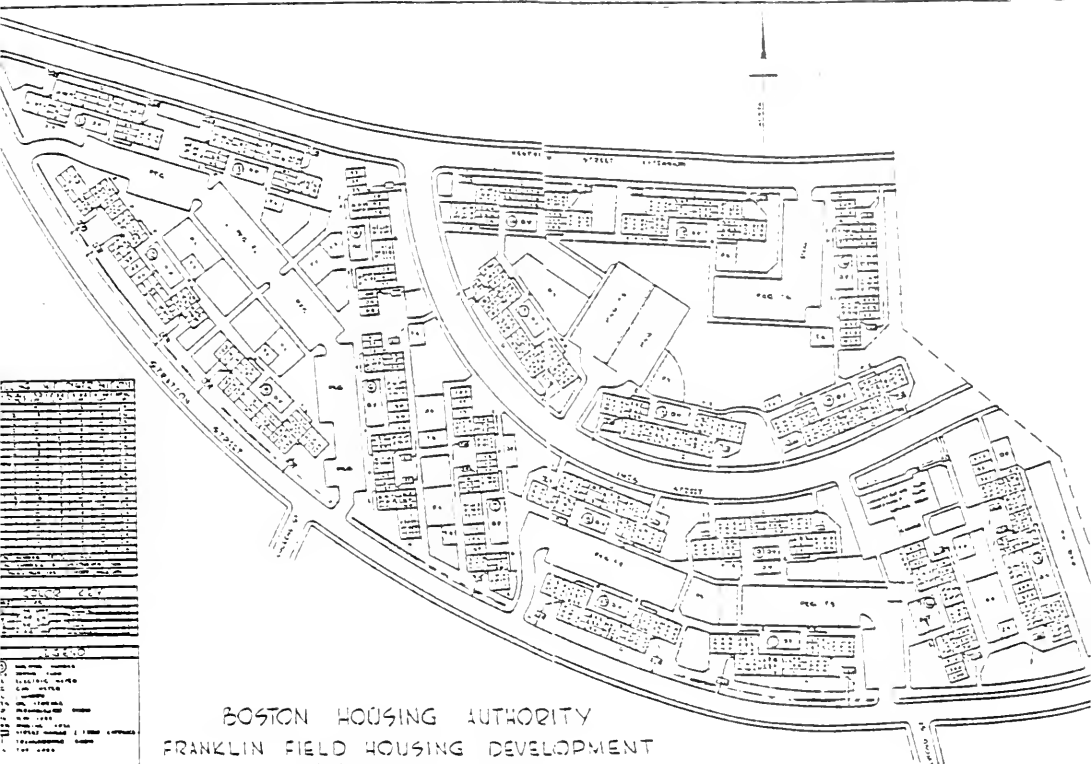
RECEIVED

JUN 16 1980

SPECIAL DEPUTY FOR OPERATIONS

OBJECTIVE

To identify existing problems and conditions - Managerial, Mechanical and Social - and to recommend positive change that will turn the Franklin Field Development into a viable and marketable community in which families will be happy to live.



BOSTON HOUSING AUTHORITY
 FRANKLIN FIELD HOUSING DEVELOPMENT
 STATE AIDED 200-11
 DORCHESTER, MASS
 JOHN M. GRAY CO. ARCHITECTS
 BOSTON, MASS

TABLE OF CONTENTS

(NARRATIVE TO FOLLOW)

HISTORICAL BACKGROUND AND CHARACTERISTICS

The Franklin Field Development was built in 1954 through State-Aided Funding. The Development is situated on 23 acres bounded by Westview, Stratton and Ames Streets and abutted by the Franklin Field Elderly Developments (667-1 & 2) at the lower end of Ames Street. The Site consists of Nineteen (19) 3-story walk-up buildings of an original construction of 504 rental units.

The unit distribution of the original 504 units are:

| <u>Quantity</u> | <u>Bedroom Size</u> |
|-----------------|---------------------|
| 72 | 1 |
| 216 | 2 |
| 180 | 3 |
| 36 | 4 |

There are Twelve (12) apartments per building with Four (4) units to a floor.

At the present time, there are no "breakthrough" units in the Development, however, there are, as of April 30, 1980, a present inventory of 168 units vacant, as per the following:

| <u>Quantity</u> | <u>B/R Size</u> | <u>Waiting List as of 4/10/80</u> |
|-----------------|-----------------|---------------------------------------|
| 37 | 1 | 21 |
| 79 | 2 | 57 |
| 44 | 3 | 52 |
| <u>3</u> | 4 | <u>14</u> |
| 168 | TOTAL | 144 |

The Waiting List figures do NOT include transfers from within the Development or transfers from other Developments.

WAITING LIST - BY RACE - PER BEDROOM SIZE

| <u>B/R</u> | <u>White</u> | <u>Black</u> | <u>Hispanic</u> |
|------------|--------------|--------------|-----------------|
| 1 | 2 | 16 | 3 |
| 2 | 1 | 52 | 4 |
| 3 | 0 | 37 | 15 |
| 4 | <u>0</u> | <u>7</u> | <u>7</u> |
| Total | 3 | 112 | 29 |

Grand Total: 144

At the present time there are 67 residents who are Underhoused and require 3, 4 and 5 bedroom apartments. Of those 67 residents, 20 have been approved by the Department of Occupancy for Transfer to 3 and 4 bedroom units which, now, are at a premium. The breakdown for Approved and pending transfer requests are:

| | <u>REQUIRING</u> | | |
|----------|------------------|--------------|--------------|
| | <u>3 B/R</u> | <u>4 B/R</u> | <u>5 B/R</u> |
| Families | 26 | 33 | 8 |

HEATING AND ELECTRICAL SYSTEMS

There are three (3) Low Pressure Steam Boilers and Hot Water Tanks supplying heat and hot water to the Development via underground lines with condensation pumps located throughout the Development to aid in water returns to the boilers. (See attached Exhibit).

Excluding the Central Boiler Plant and Management Office sites, Electrical Meter Rooms are located in the basements of all building addresses and Transformer Vaults are located in Four (4) sections of the Development. (See attached Exhibit).

HEALTH AND COMMUNITY SERVICES

Several Social Services agencies, located within 20-25 minutes walking distance, provide counselling, social, health and Welfare programs to the residents of Franklin Field. These agencies include: The Harvard Health Center, the Charles Drew Family Life Center, the Mattapan State Hospital, the Lena Park Community Center and the Dorchester APAC. Agencies located outside of the community include the Aswalos House and the National Center of Afro-American Artists. There is still a problem with easy access to many of these services due to distance, however, it is hoped that these services can be, eventually, provided on-site.

CHURCHES

Both Catholic and Protestant churches are located in the Codman Square and Mattapan Square areas, with scattered "store-front" churches within walking distance.

Legend



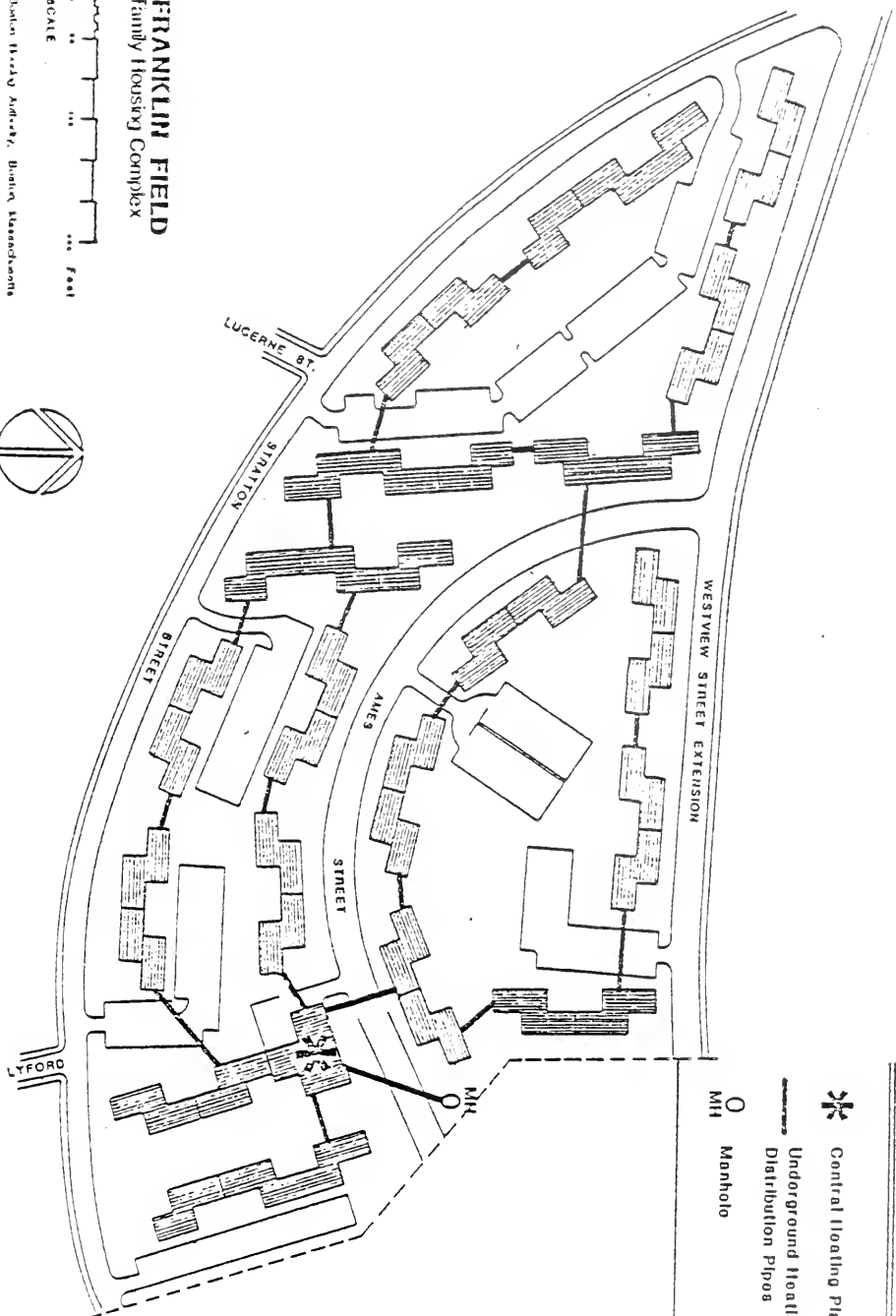
Central Heating Plant



Underground Heating Distribution Pipes











Manhole

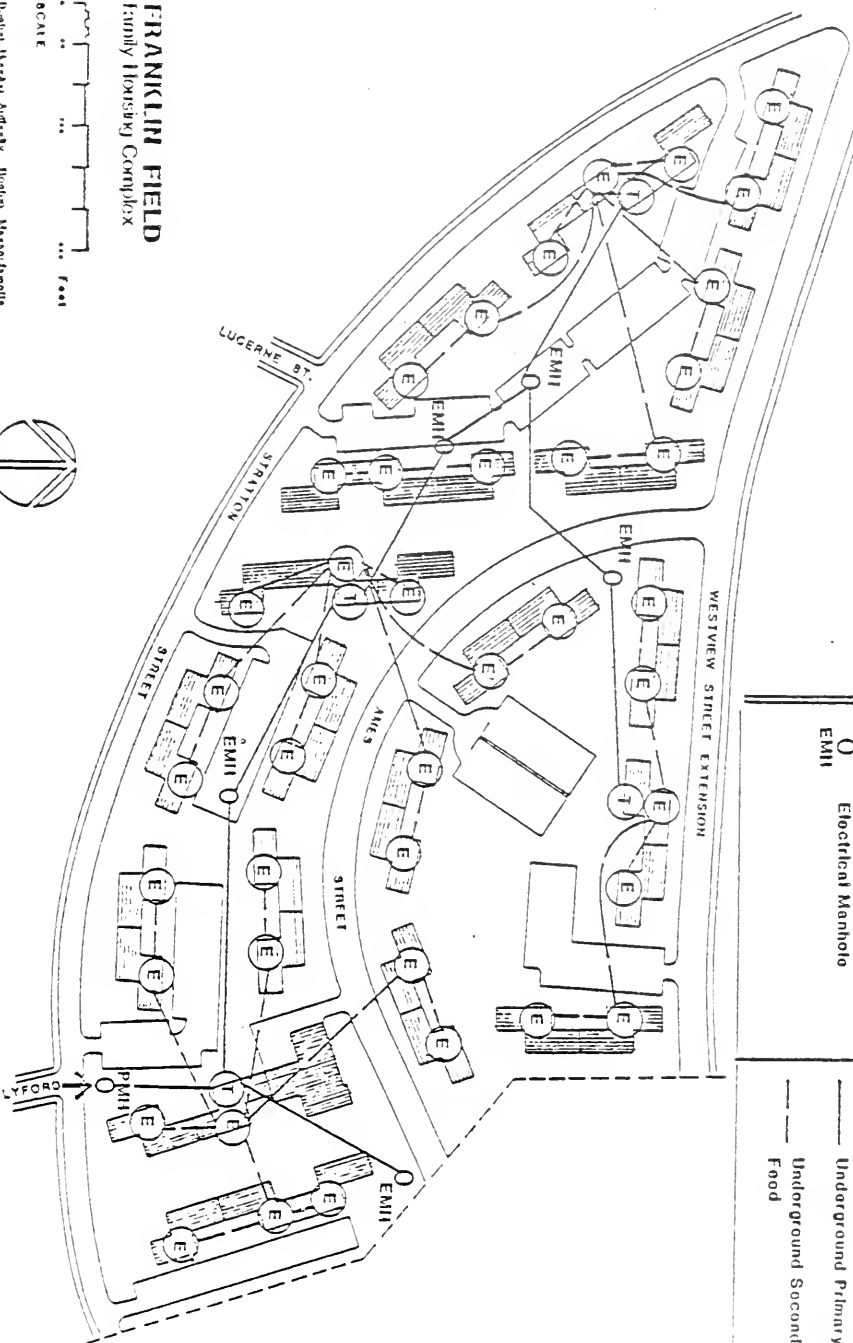


EXISTING HEATING DISTRIBUTION PLAN

Legend

-  Electrical Motor Room
-  Transformer Vault
-  Electrical Manhole
-  EMH

-  Primary Electrical Service 4 KV
-  Primary Electrical Manhole
-  Underground Primary Feed
-  Underground Secondary Feed



FRANKLIN FIELD Family Housing Complex

0 100
feet
SCALE

Division Housing Authority, Boston, Massachusetts



EXISTING ELECTRICAL DISTRIBUTION PLAN

RECREATIONAL FACILITIES

At the present time, there are no recreational facilities within the Franklin Field Development. However, adjacent to the Development is the Franklin Field Park owned by the Parks and Recreation Department of the City of Boston. The Franklin Field Park runs the length of the Development and has available to the residents and the community a combination swimming pool and ice skating rink, an indoor Tennis Court, lighted ballfield and tot-lot area. Slightly outside the immediate community and located on American Legion Highway is the Lena Park Community Center which provides all types of Recreation for the community. The Franklin Park Zoo, Picnic area and Golf Course is located approximately 1/2 mile away.

SHOPPING

The main shopping are for Franklin Field residents is presently located in the Codman and Mattapan Square areas of the City, which is approximately 20-25 minutes away by public transportation. Other smaller areas are located along Morton Street, in Grove Hall or the Dudley Street Station area.

TRANSPORTATION

The only means of transportation available to the residents of Franklin Field Are:

MBTA - two bus lines running along Blue Hill Avenue

(1) Ashmont to Dudley #22

(2) Mattapan Square to Egleston Station #29

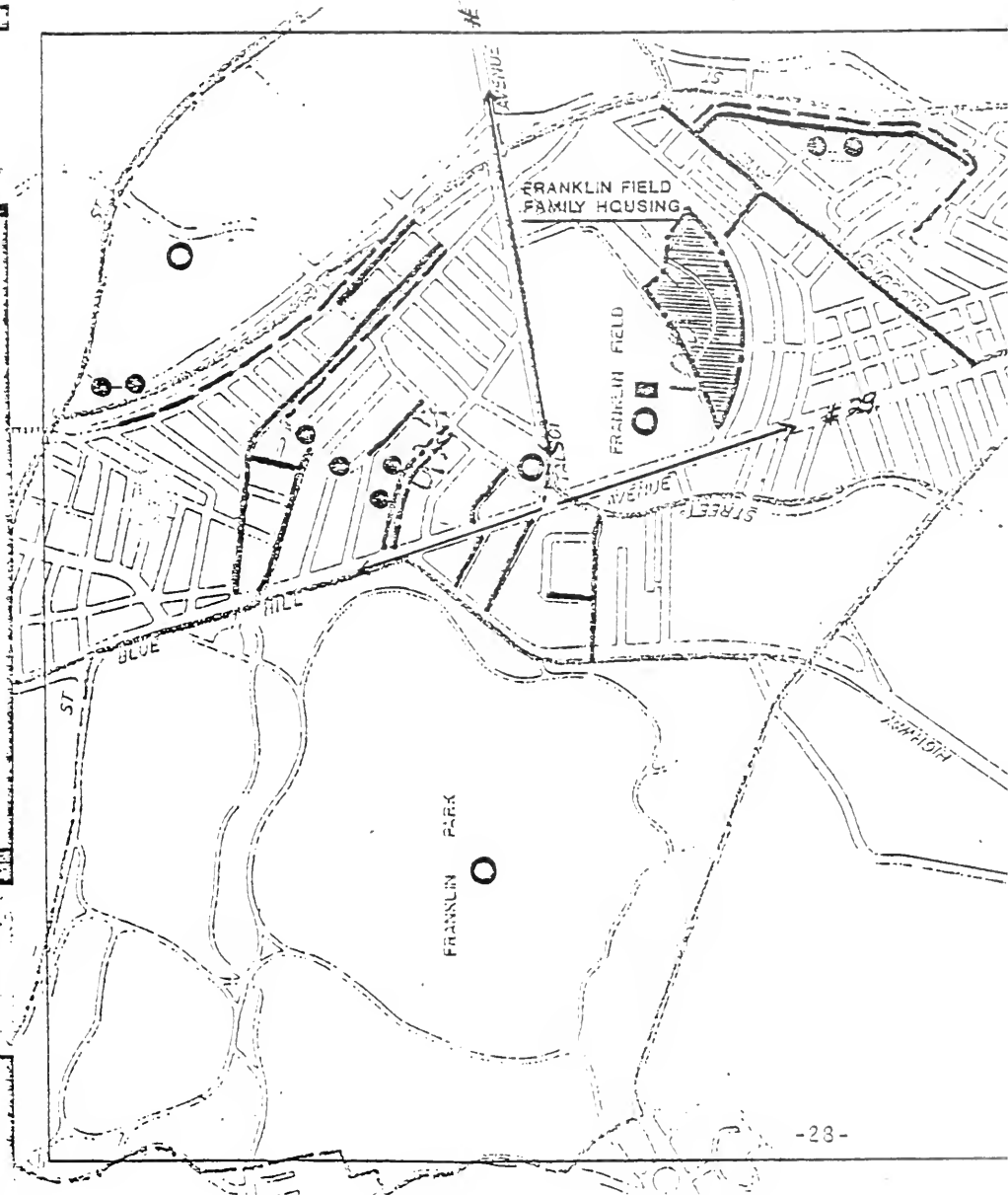
(See attached Exhibit)

Walking - which creates a hardship due to the distance of the nearest shopping center

Automobile - if the family budget allows

Taxi - depleting and straining on the family budget

#22



THE MANAGEMENT PLAN

MANAGEMENT

THE MANAGEMENT OFFICE

The Management Office is located at 91 Ames Street at the eastern end of the Development. The office consists of a small reception area and a large working area housing one Clerk/Typist. As one enters the Management Office, three (3) offices are located along the left-hand wall. These offices house the Manager, the Rent-up Specialist and the Community Organizer - the latter two positions by residents and funded by the Pilot Program. At the far end of this area is a Kitchen/Lunchroom for staff convenience, which also serves as a Conference and Meeting room. At the rear of the large area housing the Clerk/Typist is the Vault, which is the area for storage of resident keys, Petty Cash, typewriters, adding machines and other small office equipment.

The office, while not in disarray, certainly lacks the kind of atmosphere that would help to enhance the image of its staff and their responsibilities to its residents and other guests.

Cleaning of both the inside and outside of the office follows no definite schedule, although Maintenance personnel are assigned to sweep the office and clean the areas surrounding the office on a daily basis. Lighting within the office is poor.

OFFICE PERSONNEL

At the present time, due to the recent resignation of the Manager, Special Assistant to the Director of Field Management has been temporarily assigned to handle the Managerial responsibilities. Every effort is being made to find a permanent Manager for the Franklin Field Development.

The Clerk/Typist, a long time employee, is no longer able to handle the present daily clerical demands. While some improvement has been made in the filing systems, at the insistence of the District Director there is still a great deal of room for improvement. A clear example is Purchase Requisitions which are inappropriately filed as related to items received and still outstanding. Both "Open" and "Closed" Requisitions are placed in the same folder and information for previous years have not been boxed, marked and/or stored in another area. Stock Requisitions, for materials from our Central Stores warehouse, are also haphazardly filed in this folder.

The staffing of the Management Office is, and has been for several years, a "one-man, one-woman" operation. This is totally inadequate and insufficient. The assistance of the Rent-up Specialist and Community Organizer (Pilot Staff) in assuming responsibility for some of the clerical duties has attempted to alleviate part of the problem but, often has led to the neglect of their own duties. The responsibilities of the Manager have increased substantially over the years. Major new capital improvement and redevelopment initiatives - particularly the PILOT program - have placed major new demands on the Manager's time. As an example, there is an increased need for the inspection of units and buildings scheduled for rehabilitation, as well as for attending meetings, filing reports, and participating in planning sessions. As a result of all of these increased responsibilities, the Manager is less able to meet the full areas of his responsibilities.

RECOMMENDATIONS

Relocation of the Management Office

The Management Office should be re-located to the two first floor units, presently occupied, located at 180 Stratton Street. Conversations with the previous Manager and the Task Force Chairperson has indicated a willingness on the part of the residents to be re-located to another part of the Development to accommodate the purpose of establishing a new Management Office. This would then place the Management Office above the present Maintenance Department site and afford the Manager more ready access to the Maintenance Department and staff. Additionally, relocation of the Management Office would enable the Ames Street site to be used for Community Meetings, a Day Care Center or any other type services for which there may be a positive need.

PRESENT STAFFING

MANAGER

CLERK/TYPIST

RENT-up SPECIALIST

COMMUNITY ORGANIZER

PILOT

TENANT LIAISON

INTERIM STAFFING

MANAGER

CLERK/TYPIST

2 TENANT LIAISONS

FINAL STAFFING

The following recommended staff will enable the Management Office to more than adequately fulfill the requirements and responsibilities of the Franklin Field Management Office:

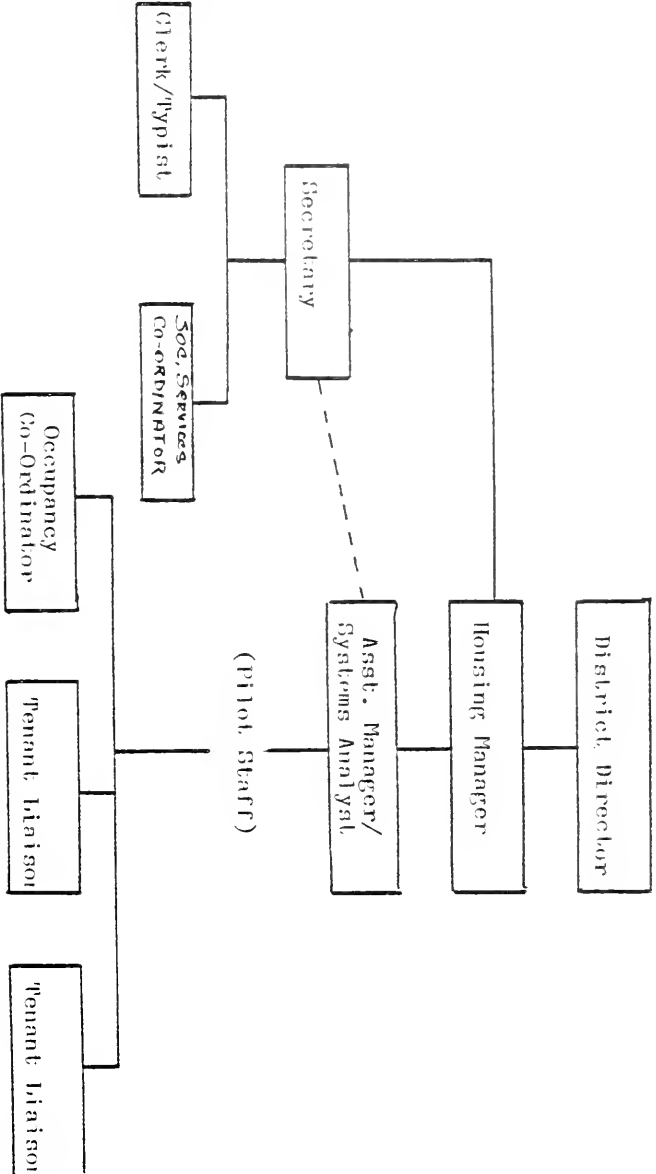
| <u>POSITION</u> | <u>ANNUAL SALARY</u> |
|--------------------------------|----------------------|
| Housing Manager | \$19,737.00 |
| Asst. Manager/Analyst | 17,570.00 |
| Secretary | 11,500.00 |
| Clerk/Typist | 7,616.00 |
| Occupancy Co-ordinator | 10,000.00 |
| Two Tenant/Liaisons @\$8,00.00 | <u>16,000.00</u> |
| Total Salaries | \$82,423.00 |

(See Management Office Staffing Chart attached)

OBJECTIVE AND PURPOSE OF RECOMMENDATIONS

To ensure that on-site Management Personnel, through training, acquire and utilize those skills that are associated with valid and sound Management practices, also, to eventually and ultimately establish an on-site Management Staff that is seen as an adequate and positive force fully capable and responsive to the needs of the residents.

Recommended
MANAGEMENT OFFICE STAFFING



TENANT SELECTION

The Housing Manager is the chief operating force in the Development and must have as much independent responsibility as possible. S/he must have almost autonomous control over a Decentralized Tenant Selection system for Franklin Field. i.e., Determining Eligibility for Admission, Occupancy, Leasing, Orientation, etc. If, because of HUD regulations, decentralization of Tenant Selection cannot be accommodated, then an Application for a Waiver must be requested of HUD.

ALTERNATIVE

The Central Administration will continue to receive applications for Occupancy, do an initial processing and preliminary screening. Refer the application to the local Development for in-depth processing, screening, home visits, current credit checks, and, where possible, check with applicant's present landlord and neighbors. Once this has been accomplished, the Manager (designee) will conduct, with representatives of the local Task Force, orientation sessions, prior to housing applicants. Before the signing of a Lease, the applicant must be totally familiar with his (her) responsibilities as a resident, the responsibilities of Management, the Lease, etc.

The final determination for housing applicants will be made by the Manager.

OCCUPANCY - MARKETING

An on-going marketing effort will be made by the District Director and Manager to:

1. review and update the current waiting list to determine the existing demand for housing by bedroom size
2. Produce, with the aid of the local Task Force and other interested parties, a Community Newsletter which outlines the "positive" aspects of the Development and the availability of apartments, for distribution to:
 - Roxbury and Dorchester Multi-Service Centers and Little City Halls
 - Roxbury and Dorchester APAC offices
 - Local Churches
 - Local newspapers (i.e., Bay State Banner, Dorchester & Mattapan News)

In conjunction with the Authority's commitment to Equal Opportunity Housing, the following agencies will be contacted in an "out-reach" effort by the Manager and Local Task Force:

- MHFA
- HUD
- EOCD
- Mass. Commission on Indian Affairs
- Officina de Alianza Hispana
- Chinese Economic Development Council
- Mayor's Office of Fair Housing
- APAC Offices and Multi-Service Centers throughout the City

If these efforts do not produce the desired results, then marketing efforts will be made by advertising in newspapers such as:

- Boston Globe
- Bay State Banner
- El Mundo
- Local Community Newspapers

OBSERVATION

If the afore-mentioned process is successfully carried out and co-ordinated with planned Capitol Improvements and expanded maintenance, then 100% occupancy should be accomplished within 3 - 6 months after completion of the Marketing Program.

UNIT AND SITE IMPROVEMENT

Before an applicant is "shown" a unit for occupancy, the following will have been initiated and completed by the Maintenance Department:

1. All windows will have been cleaned with an Ammonia based solution
2. Cleaning of all bathroom and kitchen fixtures
3. Sweeping, mopping and waxing of all floors
4. Cleaning of stoves, refrigerators, sinks, bathtubs
5. All doors and windows and electrical fixtures in working orders

6. Shades to be installed on the day of occupancy
7. Other repairs as needed

Residents who initiate improvement of conditions of the Development through supporting the maintenance of common areas, etc., must be recognized and rewarded. This can be accomplished through (1) Notices in the Newsletter (2) Letters of Thanks and (3) Commendations of Management, as well as other means. Certain sites within the Development are and will be considered the "better sections" of the Development and demand for units in those areas will be created, however, it is the intent of the District Director and the Management Staff and the local Task Force to create a demand for ALL sections of the Development where existing and new tenants will exhibit those positive qualities common to "Good Tenants".

VACANCY TURNOVER

Development-based craftsmen will be utilized to prepare a vacant apartment for re-occupancy. If more extensive preparation is necessary, (i.e. fire-damaged, flood) the BHA Central Maintenance Department will be notified as to condition and needed repairs for scheduled rehabilitation.

Notification of a move-out will be given to the Manager in the following ways:

- the resident's move-out notice
- by the laborer whose defined area of responsibility includes the building in which the apartment becomes vacant
- the building captain

(definition: that person who is designated by other residents in his/her building, or who volunteers to act as the spokes-person and representative of the specific building)

- resident education as to the importance of reporting a move-out and the ramification to their development if notice is not given to the Manager in a timely fashion. This will be accomplished, initially, through a bulletin, and reiterated periodically in the Development's newsletter. Assuming adequate staffing and funding, a vacancy should be readied for occupancy and move-in scheduled within five (5) days.

This will happen if:

- Proper written notice of 15 days move-out is given to the Manager
- The Manager (or designee) can inspect the apartment one week prior to the move-out to ascertain needed repair/replacement/painting

Notification will be sent to the appropriate personnel, by Work Orders, as to the scope of work necessary to ready the apartment for occupancy. Where possible, repair/replacement work can be done while the existing resident is in the process of moving. Concurrently, a potentially new occupancy will be identified and screened for acceptability.

This will NOT be the case where extraordinary conditions, i.e. fire damage, code violations, are in existence. These extraordinary conditions will be addressed by the Rehab Crew (CETA) or outside contracts.

CAPITOL IMPROVEMENTS

Under the Pilot Program 36 Prototypical units will have been rehabilitated. (12 units in each of three (3) addressess). However, there is still much to be done. Twelve (12) of the Prototypical units have already been completed and are occupied. Twelve (12) more units are expected to be completed and occupied within 2-3 weeks. The final twelve (12) units are expected to be completed within 3-4 months. In addition to these Thirty-six (36) units, there are approximately 70 -odd "scattered" sites under consideration for rehabilitation, depending upon the necessary funding for a Maintenance Support Crew to help alleviate this problem. (See Maintenance Support Proposal attached). Although some roofs have been refurbished and Pent Houses Cladded, there is substantial amount of work still to be done in this area.

Funds have been allocated for the Landscaping of Prototypical and other areas throughout the Development and for the upgrading of primary electrical service. It is hoped that this work can commence in the not too distant future.

In addition, the total redevelopment of Franklin Field using Section #8 Leverage financing, is now under consideration.

SOCIAL SERVICES

To enhance the tenancy of its residents, Franklin Field must have a Social Service Coordinator on site who will act as the resource person for those residents needing special assistance in, but not limited to:

- Drug Abuse
- Alcoholism
- Mental Health
- Child abuse/neglect

This employee, who will be supervised by the Manager, (designee) will make contact and establish on-going communications with the network of Social Service Agencies both City-wide and community based. In addition, s/he will work with local Social Service Agencies to facilitate the delivery of Social Services to Franklin Field residents directly on the site. Included in the Development Newsletter, which will be generated to each resident, will be an introduction of the Social Services person and the services available to the residents, which will include:

- Education
- Employment
- Health & Legal Services
- Tenant/community Relations

(more to follow)

BUDGET

Two persons have recently been hired by the Authority, whose energies will be concentrated in the area of Project Based Budgeting, specifically for the Pilot Programs and Stabilization Developments and, soon, thereafter all Developments within the Authority. These much needed and welcomed personnel will aid and assist the District Director and Manager in developing a sound and realistic based budget for the Franklin Field Development.

(more to follow)

STATEMENT OF OPERATING RECEIPTS AND EXPENDITURES

BOSTON HOUSING AUTHORITY

Project No. 100-11

No. of Units 503
Unit Months 3,336No. of Units 503
Unit Months 3,336No. of Units 503
Unit Months 3,336

| ACCOUNT NUMBER | ACCOUNT TITLE | ACTUAL 4/1/76 - 3/31/77 | | ACTUAL 4/1/77 - 3/31/78 | | ACTUAL 4/1/78 - 3/31/79 | |
|-----------------------------------|---|-------------------------|--------------|-------------------------|--------------|-------------------------|--------------|
| | | PYM | AMOUNT | PYM | AMOUNT | PYM | AMOUNT |
| OPERATING RECEIPTS | | | | | | | |
| 3105 | Shelter Rent | 47.54 | 236,421.38 | 48.66 | 293,732.07 | 47.33 | 233,266.32 |
| 3110 | Utility Charges to Tenants | 0 | 0 | 0 | 0 | 0 | 0 |
| 3115 | Boarding Rental | 0 | 0 | 0 | 0 | 0 | 0 |
| 3500 | Interest on Investments | 0 | 0 | 0 | 0 | 0 | 0 |
| 3555 | Other Operating Receipts | 0 | 0 | 0 | 0 | 0 | 5.00 |
| | TOTAL OPERATING RECEIPTS | 47.54 | 236,421.38 | 48.66 | 293,732.07 | 47.33 | 233,271.32 |
| OPERATING EXPENDITURES | | | | | | | |
| ADMINISTRATION: | | 5.32 | 35,138.39 | 9.05 | 54,501.53 | 3.23 | 49,571.64 |
| 4101 | Salaries | | | | | | |
| 4102 | Other Expenses | 1.39 | 3,371.92 | 0 | 0 | 1.15 | 7,553.27 |
| 4103 | Compensation to Auth. Members | 0 | 0 | 0 | 0 | 0 | 0 |
| 4104 | Accounting Services | 0 | 0 | 0 | 0 | 0 | 0 |
| | TOTAL ADMINISTRATION OPERATING EXPENSE | 7.21 | 47,510.31 | 9.77 | 54,501.53 | 2.18 | 57,224.91 |
| DEBENT SERVICES: | | | | | | | |
| 4201 | Salaries | 0 | 0 | 0 | 0 | 0 | 0 |
| 4202 | Recreation, Other Services | 0 | 0 | 0 | 0 | 0 | 0 |
| 4203 | Contract Costs, Training, Other | 0 | 0 | 0 | 0 | 0 | 0 |
| | TOTAL DEBENT SERVICES EXPENSE | 0 | 0 | 0 | 0 | 0 | 0 |
| UTILITIES: | | | | | | | |
| 4310 | Water | 6.32 | 38,128.90 | 10.22 | 51,660.30 | 17.27 | 72,696.72 |
| 4320 | Electricity | 44.77 | 127,122.97 | 35.00 | 150,255.12 | 41.44 | 139,755.00 |
| 4330 | Gas | 5.31 | 33,177.17 | 4.93 | 30,042.72 | 5.04 | 30,372.00 |
| 4340 | Fuel & Heating Supplies | 45.80 | 129,433.73 | 48.13 | 179,127.19 | 43.31 | 251,111.11 |
| 4350 | Heating Labor | 3.75 | 32,140.21 | 3.91 | 27,514.61 | 5.37 | 71,755.11 |
| 4390 | Other | 1.75 | 10,540.00 | 1.27 | 11,126.00 | 5.14 | 21,075.11 |
| | TOTAL UTILITIES EXPENSE | 97.95 | 348,442.98 | 102.45 | 539,726.02 | 122.12 | 686,007.02 |
| ORDINARY MAINTENANCE & OPERATION: | | | | | | | |
| 4401 | Labor | 41.57 | 250,917.71 | 44.98 | 271,490.73 | 38.04 | 129,620.13 |
| 4402 | Materials & Supplies | 5.20 | 39,810.27 | 5.27 | 37,255.22 | 5.11 | 30,859.49 |
| 4403 | Contract Costs | 1.83 | 47,350.32 | 5.25 | 50,722.15 | 4.88 | 29,475.88 |
| | TOTAL ORDINARY MAINTENANCE & OPERATION | 56.01 | 338,068.30 | 61.23 | 369,578.15 | 58.03 | 290,955.50 |
| PROTECTIVE SERVICES: | | | | | | | |
| 4501 | Labor | 0 | 0 | 0 | 0 | 0 | 0 |
| 4502 | Material & Supplies | 7.01 | 725,200.00 | 0 | 0 | 7.01 | 750.45 |
| 4503 | Contract Costs | 0 | 0 | 0 | 0 | 0 | 500.00 |
| | TOTAL PROTECTIVE SERVICES | 7.01 | 725,200.00 | 0 | 0 | 7.01 | 1,250.45 |
| GENERAL EXPENSE: | | | | | | | |
| 4711 | Insurance | 4.89 | 41,566.59 | 9.12 | 38,127.12 | 4.40 | 26,565.20 |
| 4715 | Employee Benefit Contribution | 9.20 | 49,497.00 | 9.25 | 54,501.53 | 13.56 | 32,475.82 |
| 4720 | Collection Fees | 0 | 0 | 9.81 | 57,114.12 | 5.39 | 25,111.11 |
| 4740 | Payment in Lieu of Taxes | 3.01 | 13,124.00 | 2.00 | 12,111.11 | 2.21 | 18,125.00 |
| 4780 | Other General Expenses | 0 | 0 | 0 | 0 | 0 | 0 |
| | TOTAL GENERAL EXPENSES | 17.10 | 104,187.59 | 30.40 | 162,233.78 | 25.56 | 132,267.13 |
| RESERVE & DEBT SERVICES: | | | | | | | |
| 4790 | Prov. for Operating Reserve | 7.02 | 42,360.00 | 7.02 | 42,360.00 | 7.02 | 42,360.00 |
| 4794 | Prov. for Debt Service Reserve | 0 | 0 | 0 | 0 | 0 | 0 |
| 5100 | Debt Service Requirement | 3.44 | 34,348.20 | 0 | 0 | 0 | 0 |
| | TOTAL RESERVE & DEBT SERVICE | 10.46 | 76,708.20 | 7.02 | 42,360.00 | 7.02 | 42,360.00 |
| | TOTAL OPERATING EXPENDITURES | 181.31 | 1,014,442.11 | 202.55 | 1,102,576.12 | 124.13 | 1,111,729.03 |
| RESIDUAL RECEIPTS (or OFFSETS) | | | | | | | |
| | PRIDE TO COMMONWEALTH GOVT. | (125.77) | (319,527.08) | (153.83) | (928,318.11) | (126.95) | (326,507.00) |
| COMMONWEALTH CONTRIBUTION: | | | | | | | |
| 7100 | Debt Service Contribution | 9.47 | 57,082.00 | 0 | 0 | 0 | 0 |
| 7200 | Reduction for Debt Service Contribution | 0 | 0 | 0 | 0 | 0 | 0 |
| 7100 | Operating Subsidy Contribution | 11.71 | 591,748.20 | 10.59 | 577,275.79 | 11.32 | 509,832.11 |
| | TOTAL COMMONWEALTH CONTRIBUTION | 21.18 | 648,830.20 | 10.59 | 577,275.79 | 11.32 | 509,832.11 |
| | Residual Receipts (or Offsets) | (11.71) | (70,575.64) | (34.19) | (205,381.83) | (2.99) | (12,245.00) |
| | Net Change in Operating Reserve | (2.32) | (24,360.00) | (2.32) | (24,360.00) | (2.32) | (24,360.00) |
| | Net Change in Debt Service | (3.44) | (34,348.20) | (3.44) | (34,348.20) | (3.44) | (34,348.20) |

EVICTIIONS

Eviction proceedings (for non-payment of rent and cause) is presently being enforced. The length of time involved in processing the eviction procedure because of (1) Grievance Hearing procedures and (2) reticence of victims/witnesses to testify are being addressed by reducing time frames, working more closely with the Boston Police Department, concentrating the BHA Security Dept. resources, increasing, substantially, the BHA Legal staff and, although meager, making available various avenues of protection for Victims/witnessess.

(more to follow)

ADMINISTRACION PARA LOS PUEBLOS DE INDIAS HISPERICAS, 51 CALLE NO
PUEBLO DE LOS INDIOS, SANCA LEON, DISTRITO DE SAN CRISTOBAL DE
HONDURAS, DE SU CALIFICACION.

NOTICE OF PRIVATE CONFERENCE

Date: _____

Dear Tenant:

You are hereby invited to have a Private Conference with the
Manager at the Manager's Office on _____, 19 ____, at _____
o'clock, to discuss the matter of certain complaints that have
been made against your tenancy, which if substantiated, may be
grounds for your eviction from the EMI. These complaints include:

If you do not appear for this conference, or contact the
Manager before the time scheduled for the conference to arrange a
different time for the conference, it could lead to the beginning of
the eviction process against you. At the end of the conference, or
if you do not appear for this conference, the Manager will determine
whether or not to proceed with the eviction process.

The Manager will notify you if the determination to proceed with
the eviction process.

You are advised that anything you say at this conference is
not confidential, and may be used in any subsequent proceeding.
You have a right to remain silent. The law is on your side for information.

1. ALL INFORMATION CONTAINED HEREIN IS UNCLASSIFIED EXCEPT WHERE SHOWN OTHERWISE BY DATE 03/28/2013 BY 60322 UCBAW/STP/STP

NOTICE OF HEARING TO APPEAR

Date: _____

Dear _____:

You are hereby notified that the Boston Housing Authority, having had a private conference with you or having given you an opportunity to appear at a private conference at which you did not appear, has determined to take steps which could lead to your eviction on the grounds indicated in the notice of private conference.

You will, therefore, be given an opportunity to appear before a Hearing Panel within a near this matter.

You are advised that you have a right to a hearing before a Hearing Panel, and a right to be represented at the hearing. Anything you say at the hearing is not confidential and may be used in any subsequent proceedings. You have a right to see, to present witnesses and documentary evidence, and to confront any witnesses against you, and you have a right to remain silent.

You will be notified of the time and place of the hearing by the Hearing Panel.

Very truly yours,

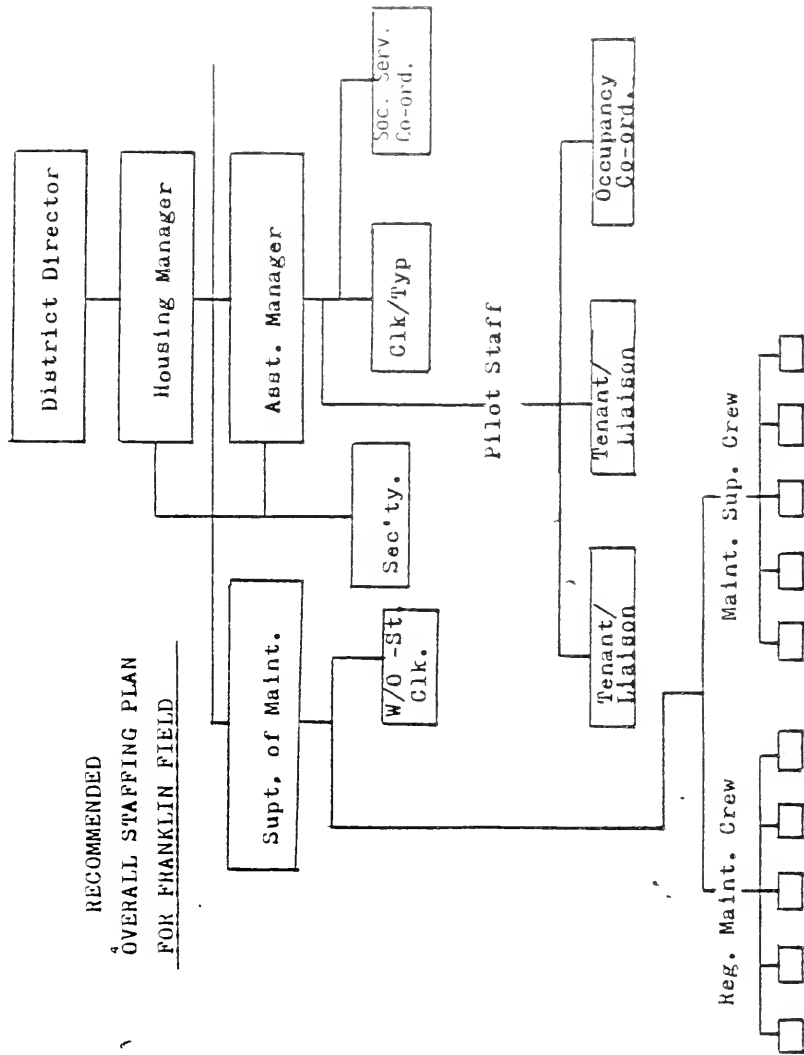
BOSTON HOUSING AUTHORITY

Housing Manager

INTERFACEMENT OF DEVELOPMENT COMPONENTS

(to be written)

RECOMMENDED
 OVERALL STAFFING PLAN
 FOR FRANKLIN FIELD



POSITION:

CLERK/TYPIST

GENERAL DESCRIPTION

TYPICAL EXAMPLES OF WORK

MINIMUM QUALIFICATIONS

EXPERIENCE

(to follow)

POSITION: SOCIAL SERVICES CO-ORDINATOR

GENERAL DESCRIPTION:

UNDER THE SUPERVISION OF THE MANAGER.

TYPICAL EXAMPLES OF WORK PERFORMED:

MINIMUM QUALIFICATIONS

EXPERIENCE

(to follow)

RENT COLLECTION

In July of 1979, rent collection activity, throughout the Authority, became a priority. At the present time, the rent arrearage at Franklin Field is \$ 62,900.00 compared to \$ 67,000.00 of one (1) year ago. (May 1979 - May 1980)

A methodical approach is now in progress regarding the collection of rental arrearages and definitive guidelines, for Managers, have been established.

To further enforce this basic Management function, on the eighth (8) day of each month, residents who have NOT paid their current rent, will receive a "reminder" generated from the Central Office computer. On the tenth (10) working day, Managers will receive, from the computer, automatic "Private Conference" letters to send or hand deliver to those residents in arrears - the first step in the eviction process.

If an agreement is not reached, or if the resident does not abide by the agreed-upon payment schedule, the case is then brought before the hearing panel, according to the EOCD/HUD approved "Grievance Hearing Procedures". The resident must receive notice of the date of the hearing seven (7) days prior to the actual hearing.

(See attached exhibits)

1987年12月15日 星期一

THE STATE OF CALIFORNIA, County of _____
I, _____, of the County of _____, State of California, do hereby certify that the foregoing is a true and correct copy of the original as the same appears from the records of the County of _____, State of California.

WITNESSED

Date: _____

It is hereby agreed between Tenant,

(Name)

(Type) _____

(Address) _____

(City) _____

and Landlord, _____

that: _____

It is understood that this Agreement does NOT otherwise waive any rights of either party, nor change the terms of the lease, including the amount of the monthly rent.

Tenant

Landlord

PILOT STAFF

to the Supervisor of the on-site CETA Work Crew, and whose function is to orient residents of a particular address prior to work being performed within that address; also, to establish those systems, in conjunction with the Manager and his staff, that will prepare the building and residents for the work to be done. At best, it appears these particular duties did not become factual or were ever properly monitored. This is not to imply that the present Liaison is not capable of performing those tasks described in the Job Description, but supervision and monitoring was not properly undertaken by the Manager.

RECOMMENDATIONS

That the Tenant Liaison be supervised and trained by the Manager (or designee) and a review and re-writing of the duties to be performed be done immediately.

THE COMMUNITY ORGANIZER has attempted to perform the duties prescribed in the Job Description, but has been unable to fully perform the tasks for reasons mentioned earlier. It is unclear as to why the Community Organizer has been supervised by the Housing Manager, however, discussions are presently underway with the District Director and the Pilot Co-ordinator to review and re-define the duties and supervision of the Community Organizer.

Because the present Community Organizer is also the Task Force Chairperson, a conflict of roles exists which can and does have a detrimental effect upon the employee and impede the capability of duty performance.

RECOMMENDATION

That the supervision and Job Description of the Community Organizer be reviewed and re-defined; that the Community Organizer be based out of the Task Force Office and under the supervision of the On-Site Co-ordinator (when placed) and, in the interim, by the Pilot Co-ordinator.

ADDED COMMENTS

Continued discussions are in progress with the District Director the Pilot Co-ordinator, representative of EOCB and the Pilot Staff regarding the re-refining and review of the present positions.

MAINTENANCE

MAINTENANCE

WORK ORDER SYSTEM

A Development-based store, will soon be implemented at Franklin Field.

The store will stock an initial thirty-day (3) supply of materials routinely used by the maintenance personnel on site.

With Development based-budgeting, Franklin Field will be charged only for delivered material to the Development "store", and not for material(s) stored at the Central Stores warehouse in anticipation of demand from the Development.

A Work Order (Stores) Clerk, already in place, whose additional training and duties will include:

- record and screen maintenance service requests for priority
- issue the requests to the Maintenance Superintendent for logging and distribution to the appropriate developmental personnel
- issue the anticipated stock for the specific service request
- utilize and be accountable for the inventory control system(s)

Each day the Manager (designee) and Superintendent will review service requests and prepare a priority schedule for the following day's work.

Tenant signature where possible, will be affixed, to the completed service request, indicating (1) approval of the work performed and (2) acceptance of the noted time of completion.

MAINTENANCE SUPPORT PROPOSAL

THE NEED

One of the highest priorities of the Franklin Field Pilot Program has been the hiring of a Maintenance Support Crew. With more than 30% of the 504 units at Franklin Field vacant and a substantial waiting list, and additional crew is vital in order to return the Development to 100% occupancy.

INTENDED ACCOMPLISHMENTS

In addition to meeting all State Safety and Sanitary Code requirement, specifically, for presently occupied units and buildings and, eventually, for all units and buildings throughout the Development, but also not excluded to:

1. Relocating families from and to designated "Prototypical" buildings in a timely manner
2. Securing and rehavitating, for immediate occupancy, those units vacated by families moving into the "Prototypical" buildings, the "turnover" of approximately 160 odd now vacant units
3. Cleaning out and securing all basement areas
4. the expedient completion of day-to-day Work Order complaints for occupied units.

THE OBJECTIVE

Families will vacate designated Prototypical buildings in a timely fashion so as not to cause even the slightest delay in the schedule of the on sight CETA Rehab crew. The work of the CETA crew is, now, relatively routine, however, given the "lag-time" that exists in all construction, it is felt that the CETA crew can, on the average, turnover one scattered unit per week as well as keep to the schedule on the Prototypical buildings. Those scattered site units should be the prime responsibility of the CETA Rehab crew in order to limit problems with their tight schedule.

MATERIALS

Materials, which will be paid out of the BHA's Operating Budget, will be obtained prior to the commencement of rehabilitation of units and will be stocked in the Franklin Field Maintenance Department, and will be the direct responsibility of the Housing Manager and the Maintenance Superintendent.

1. Present Accomplishments

Attempting to meet the day to day tenant Maintenance complaints as well as HID, Lead Paint and Emergency and extra ordinary service requests.

2. Non-Accomplishments

The inability, because of demands presently being addressed, to effectuate expediant apartment turnover

Cleaning-out, securing and boarding-up of basements, vacant and/or vandalized units, addressing back-ups, main drains, stack stoppages, steam leaks, dig-ups power failures, etc.

The following is an indication, by craft, of a Weekly Work Order Flow, for occupied units only:

| <u>CRAFT</u> | <u>PREV. OUTSTANDING</u> | <u>INCOMING</u> | <u>COMPLETE</u> | <u>OUTSTANDING</u> |
|--------------|--------------------------|-----------------|-----------------|--------------------|
| Appliance | 15 | 0 | 1 | 14 |
| Carpentry | 84 | 20 | 7 | 97 |
| Electrical | 5 | 5 | 2 | 8 |
| Glazing | 1 | 7 | 7 | 1 |
| Painting | 8 | 2 | 0 | 10 |
| Plastering | 25 | 1 | 0 | 26 |
| Plumbing | 21 | 27 | 26 | 22 |
| Steamfitting | 4 | 0 | 0 | 4 |
| Welding | 18 | 0 | 9 | 11 |
| Floor Tiling | 22 | 3 | 0 | 25 |

PRESENT STAFFING

In addition to a Work Order/Stores Clerk and seven (7) Laborers, there is a Carpenter, Plumber and Glazier, all under the immediate supervision of the Maintenance Superintendent, on-site. A Steamfitter, Appliance man, Electrician and Painter, utilized for 1 to 2 days per week, are shared with the other four (4) Developments withing the District. There is no Plasterer either on-site or within the District. (See attached for Maint. Coverage of Development)

REQUESTED STAFFING & COST

| <u>REQUIRED</u> <u>MANPOWER</u> | <u>CRAFT</u> | <u>WEEKLY</u> <u>RATE</u> | <u>WEEKLY</u> <u>TOTAL</u> |
|------------------------------------|--------------|------------------------------|-------------------------------|
| 3 | Carpenters | \$547.60 | \$1,642.80 |
| 2 | Painters | 584.80 | 1,169.60 |
| 1 | Plasterer | 532.00 | 532.00 |
| 1 | Plumber | 635.20 | 635.20 |
| 2 | Laborers | 433.20 | <u>866.40</u> |
| Maximum Weekly Payroll Total | | | \$4,846.00 |
| Weeks | | | <u>X 30</u> |
| Total Cost | | | \$145,380 .00 |

This budget assumes that each member of the requested Crew works a 40 hour week continously for a period of thirty (3) weeks. The Crew is entitled to no Fringe Benefits: therefore, they do NOT receive pay when they do not work. They work as independent Contractors under a personal service contract to the Boston Housing Authority.

Since they do NOT get paid for Sick Leave, Holidays or Annual Leave or Late Time, it is felt that this Crew can be kept for approximately 36 weeks (9 months).

Costs for the Crew will be processed and controlled by the Accounting Department of the Boston Housing Authority and will be scrutinized and monitored, regularly, by the local Housing Manager, Task Force, District Director and Director of Field Management.

Shaded Portion - Building
Renovation PHASE 1

Contract Units of Phased
Activities

* Existing Management Office
& Hitting Plant

Building Number

PHASE 6 -
120 Units
Funding Source Undetermined

WESTVIEW STREET EXTENSION

PHASE 4 -
132 Units
Funding Source Undetermined

Play Lot A

PHASE 1 -
38 Units
Pilot Modernization (1)
FRANKLIN FIELD
Family Housing Complex

SCALE
0' 10' 20' 30' Feet
Boston Housing Authority, Boston, Massachusetts



PHASE 2 -
60 Units
Pilot Modernization (2)

PHASE 3 -
160 Units
Section 8 (1) Funding

-97-
Appendix - 107-

(Revision Oct. '79 - Bldgs Numbered)

DEVELOPMENT PHASING PLAN

HAROLD L. SANDERS ASSOCIATES

SUPERVISION

The requested Maintenance Support crew will be supervised by the Maintenance Superintendent at Franklin Field. He may assign one of the crew to be the "gang Boss" (50¢/hr. increment). Units to be ^{rehab}rehabilitated will be "pre" and "post" inspected by the Maintenance Superintendent and Housing Manager; also, periodically, by the District Director. (See attached Inspection Forms).

MONITORING OF PERFORMANCE STANDARDS

1. Weekly Work Order Report

This report is handled by the Work Order Clerk daily, who charts all incoming and completed Work Orders, keeping a running balance from week to week. At the present time this report is forwarded to the District Director each week that an actual reading can be made to determine trends, etc. This report can be maintained for the Additional Crew ^{vacancy} to monitor actuals of the ^{be}rehabilitative program. This report, prior to the Dist. Dir., will ^{be}referred directly to the local Housing Manager for approval. (See attached Sample #1)

2. District Weekly Work Order Report

This report can be done by the Secretary to the District Director and is a Recap of actuals throughout the District. The same, or a similar report, can be done for the Additional Crew. The information for this report is obtained from ^{a copy of} the Weekly Work Order Report which is forwarded to the District Director. (See Sample 2 attached)

3. REPORT OF WEEKLY WORK ORDERS - OUTSTANDING

This report is done by the District Director for all the Developments within his District and is forwarded to the Director of Field Management on a weekly basis indicating those Work Order Complaints, by Craft, that are outstanding. (See Sample 3 attached)

4. WORK ORDER

The Work Order is not only self-explanatory but, also, indicates costs of labor and materials. (See Sample 4 attached)

5. WORK ORDER FOLLOW-UP REPORT

This report is to be done by the Tenant/Liaison person(s), one of whom is already employed under the Pilot Program. Daily visits are made to occupied units to inspect completed Work Orders and inquire about standards of attitude, performance and time involved in performing tasks. After information has been obtained from tenant, these reports are forwarded to the Housing Manager for filing or follow-up action. (See Sample 5 attached)

6. BHA APARTMENT INSPECTION FORM

This form is utilized by both the Maintenance Superintendent and the Housing Manager in the Pre and Post Inspection of Vacant and Occupied Units. In the case of anticipated leasing of a vacant unit, this form is also used when an applicant for the unit is seeing the unit for the first time. If the unit is satisfactory to the applicant, the applicant's signature is required on the form. This is a 4-part form indicating distribution. (See Sample 6 attached)

7. WEEKLY MAINTENANCE WORK ORDER COSTS FORM

This form can be handled by either the Work Order Clerk or the Maintenance Superintendent but must be forwarded to the Housing Manager weekly. This form can be multi-faceted in that it can determine time studies, expediency of inception of Work Order to completion, Worker identification, Craft ratios, but, most importantly, approximates of unit costs and actuals of Labor and Materials and can be determinants for Project-based Budgeting. (See Sample 7 attached)

8. WEEKLY WORK ORDER LOG

This Log is kept by the Maintenance Superintendent and is subject to review by the Housing Manager on a weekly basis. The Log is, basically, a composite of the various forms herewith contained. A Sample of this Log is NOT attached as each Developmental Weekly Work Order Log is set-up differently from the other although the basis information is the same. The Log is periodically reviewed by the District Director.

WEEKLY WORK ORDER REPORT

Dev. Name & No. _____

W/E Friday

| | Prev. Week | Monday | | Tuesday | | Wednesday | | Thursday | | Friday | | Weekly Totals | | |
|----------------------|------------|--------|------|---------|------|-----------|------|----------|------|--------|------|---------------|------|------|
| | | Rec | Cptd | Rec | Cptd | Rec | Cptd | Rec | Cptd | Rec | Cptd | Rec | Cptd | Bkly |
| Craft | Bklog | | | | | | | | | | | | | |
| Appliance | | | | | | | | | | | | | | |
| Carpenter | | | | | | | | | | | | | | |
| Electrician | | | | | | | | | | | | | | |
| Glazier | | | | | | | | | | | | | | |
| Laborer | | | | | | | | | | | | | | |
| Painter | | | | | | | | | | | | | | |
| Plasterer | | | | | | | | | | | | | | |
| Plumber | | | | | | | | | | | | | | |
| Steamfitter | | | | | | | | | | | | | | |
| Site & Structure | | | | | | | | | | | | | | |
| Welder | | | | | | | | | | | | | | |
| Floor Tile (Ceramic) | | | | | | | | | | | | | | |
| Tile | | | | | | | | | | | | | | |
| HD's | | | | | | | | | | | | | | |
| Count Orders | | | | | | | | | | | | | | |
| Lead Paint | | | | | | | | | | | | | | |
| TOTALS | | | | | | | | | | | | | | |

Submitted by _____

Approved by _____

DISTRICT

WEEKLY WORK ORDER REPORT

W/E

| | Col. Pt. | | | Fr. Pld. | | | Pr. Hld. | | | DISTRIC T | | |
|------------------|------------|------|------|----------|-----------|------|----------|-------|-----------|-----------|------|-------|
| | Prov. Week | Rec. | Cptd | Bklog | Prev Week | Rec. | Cptd | Bklog | Prev Week | Rec. | Cptd | Bklog |
| Craft | | | | | | | | | | | | |
| Appliance | | | | | | | | | | | | |
| Carpenter | | | | | | | | | | | | |
| Electrician | | | | | | | | | | | | |
| Glazier | | | | | | | | | | | | |
| Laborer | | | | | | | | | | | | |
| Painter | | | | | | | | | | | | |
| Plasterer | | | | | | | | | | | | |
| Plumber | | | | | | | | | | | | |
| Steamfitter | | | | | | | | | | | | |
| Site & Structure | | | | | | | | | | | | |
| Welder | | | | | | | | | | | | |
| Tile (floor) | | | | | | | | | | | | |
| Tile (Ceramic) | | | | | | | | | | | | |
| Tile | | | | | | | | | | | | |
| HDP's | | | | | | | | | | | | |
| Court Orders | | | | | | | | | | | | |
| Lead Paint | | | | | | | | | | | | |
| TOTALS | | | | | | | | | | | | |

Submitted by

Approved by



INTEROFFICE COMMUNICATION

Date _____

TO: Mary Kelly, Director, Field Management

AT: Central Office - Management

FROM: District Director

AT: District 5

SUBJECT: WEEKLY WORK ORDERS OUTSTANDING REPORT

Indicates outstanding Work Orders, completed Work Orders and balance each week, per development.

Development _____

Week Ending _____

BMA 2

| CRAFT | Previous Outstanding Work Orders | Total Complete This Week | Total Voided | Total Outstanding |
|------------------|--|--------------------------------|-----------------|----------------------|
| APPLIANCE | | | | |
| CARPENTER | | | | |
| ELECTRICIAN | | | | |
| GLAZIER | | | | |
| LABORER | | | | |
| PAINTER | | | | |
| PLASTERER | | | | |
| PLUMBER | | | | |
| STEAMFITTER | | | | |
| SITE & STRUCTURE | | | | |
| WELDER | | | | |
| FLOOR TILE | | | | |
| CERAMIC TILE | | | | |
| HID's | | | | |
| COURT ORDERS | | | | |
| LEAD PAINT | | | | |
| TOTALS | | | | |

Signed _____

District Director

BLUE - Workman & Data Processing WHITE - Data Processing YELLOW - Tenant PINK - Area Maintenance Office

MATERIAL USED

| | | | | | | | | | | | |
|----------------|--|-----------|--|-------------|--|----------|--|------------|--|-------------|--|
| F. 003875 | | STOCK NO. | | DESCRIPTION | | Quantity | | Unit Price | | Extens. Pr. | |
| W.S. NO. | | | | | | | | | | | |
| M M O D | | | | | | | | | | | |
| Date completed | | | | | | | | | | | |

| EMPLOYEE NO. | LABOR TIME | | | | | | | | | |
|--------------|------------|-------|--|--|--|--|--|--|--|--|
| | Hrs. | Mins. | | | | | | | | |
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| | | | | | | | | | | |

\$ [] .00
material cost (dollars)

Cause of work ☐

change in scope of work ☐ *

| | | | |
|-----------------------|-------------|---|--|
| Cause of work: | | COMMENTS: | |
| F Fire | V Vandalism | | |
| M Misuse | W Wear | | |
| N New work | | | |
| | | JOB INSPECTED BY: | |
| | | Describe the changed scope of work, if any. * | |
| workman's signature | | | |

WORK ORDER FOLLOW-UP REPORT

Work Order No. _____

NAME _____

Address _____ Apt. No. _____

Complaint: _____

Date Reported _____

Date Completed _____

In Person ☐By Telephone ☐By Manager ☐Other _____
(explain) ☐

Craft: _____

Worker: _____

1. Time it took Worker to complete job? _____

2. Was Worker's attitude Good _____ Fair _____ Poor _____

3. Were you asked and did you sign the Work Order? ☐ ☒
yes no4. Were you satisfied with the work performed? ☐ ☐
yes noGeneral Comments: _____

Tenant's Signature: _____

Tenant/Liaison Signature: _____

Date: _____

SAMPLE #6

BIA APARTMENT INSPECTION FORM

CONDUCTOR'S USE

COMM. RT

CATEGORY

APPL. FOR BIDS

APPL. FOR BIDS

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GOALS

As tenants transfer into the Prototypical buildings, they normally leave substantially livable units. These units, if not secured and re-occupied quickly, often become vandalized and then are in need of major repair.

The primary Goal of the requested Maintenance Support Crew is the securing and turning over of these units.

The second Goal is to begin to reduce the approximately 150 vacant units.

The third Goal - and only as support for the permanent on-site Maintenance Crew - will be satisfying routine Work Order Complaints in occupied units: however, until the two previous goals are met, the Support Crew will be used sparingly only.

It must be clearly understood that the attached forms are merely monitoring devices only for Standards of Performance and that such forms can, occasionally, reflect erroneous information; also, the forms are subject to periodic review, revision, etc.

The only effective monitoring of Performance Standards are by daily presence of Supervisory Personnel and the demand for the highest Level of Performance Standard and Accountability.

ALTERNATE MAINTENANCE PROPOSAL

There is NO Alternate Maintenance Proposal herewith submitted as it has been understood that a specific amount of funds are presently available to the Franklin Field Pilot Program: therefore, this proposal addresses, specifically, those available funds.

PREVENTATIVE MAINTENANCE SYSTEMS

1. Apartment and Building Inspections

Semi-annually, the Manager (or designee) will - routinely - inspect apartments and buildings for the purpose of identifying potential maintenance problems on a rotating schedule. Residents will be notified forty-eight (48) hours in advance of the scheduled inspection of apartments. Residents who refuse entry

to Management staff for other than sufficient reason(s), i.e. sickness, emergency requiring absence from apartment, will be notified, in writing, of the breach of their lease and legal action will commence.

Residents will be responsible for notifying the Manager, immediately, if an inspection cannot take place and the reason(s) for the refusal. It has been determined that apartment inspections, done by BHA personnel in 1978 for Preventative Maintenance purposes, takes a maximum of twenty (20) minutes. This allows for resident conversation and additional expressed concerns. A trained Inspector can gather preventative maintenance data, as well as deferred maintenance data, in this period of time.

A Two member team (Manager and designee) could, realistically, inspect 504 units at Franklin Field, semi-annually, at the rate of seven (7) hours per week, 21 units per week, 50 weeks per year.

2. Painting of units & hallways
3. Heating System Plan
4.
 - A. In-house Maintenance
 - B. Central Maintenance
 - C. Contracted Maintenance

(narrative to follow)

DEFERRED MAINTENANCE

(narrative to follow)

EVALUATION OF TECHNICAL WORK

QUALITY CONTROL

(narrative to follow)

INTERFACEMENT OF MAINTENANCE & MANAGEMENT

(narrative to follow)

SYSTEMS FOR EVALUATION OF JOB PERFORMANCES

(narrative to follow)

JOB DESCRIPTIONS

POSITION: MAINTENANCE SUPERINTENDENT

GENERAL DESCRIPTION

DUTIES PERFORMED

MINIMUM QUALIFICATIONS

POSITION:

WORK ORDER/STORES CLERK

JOB DESCRIPTION

DUTIES PERFORMED

MINIMUM REQUIREMENTS

(to follow)

POSITION:

LABORER

GENERAL DESCRIPTION

TYPICAL EXAMPLES OF DUTIES

MINIMUM QUALIFICATIONS

EXPERIENCE

(to follow)

JOB DESCRIPTION

ALL CRAFTS

GENERAL DESCRIPTION

DUTIES PERFORMED

MINIMUM QUALIFICATIONS

EXPERIENCE

(individual descriptions on crafts to follow)

SUMMARY

(NARRATIVE TO FOLLOW)

EXHIBIT 2

NEW PROVISIONS OF TEAMSTER CONTRACT CONCERNING
PERSONNEL SELECTION

SUPPLEMENTARY AGREEMENT

This SUPPLEMENTARY AGREEMENT is made and entered into on July 25, 1980 by and between the Boston Housing Authority and its Receiver (hereinafter referred to as "Receiver/Administrator") and Local Union No. 122, affiliated with the International Brotherhood of Teamsters, Chauffeurs, Warehousemen, and Helpers of America (hereinafter referred to as "the Union").

WHEREAS, on May 9, 1980 the Union and the Receiver/Administrator agreed to reopen and commence good-faith negotiations with respect to certain provisions of the collective bargaining agreements (Agreements "A" and "B") effective April 1, 1979 through March 31, 1982 (hereinafter referred to as the "Agreement");

WHEREAS, the Union and the Receiver/Administrator have completed the negotiations under the re-opener agreement;

NOW, THEREFORE, in consideration of the mutual promises and agreements herein contained, the parties mutually agree as follows:

Interviewing Panels

(a) All qualified applicants will be interviewed by an interviewing panel which will be advisory to the Receiver/Administrator. The interviewing panel shall consist of up to two individuals selected by the Union and up to two individuals selected by the Receiver/Administrator. The members of the panel shall be familiar with the duties and functions to be performed by an incumbent in the position to be filled. A representative of the Personnel Department will coordinate the functions of the panel.

Panel members shall not serve on two consecutive panels and no panel member shall serve on more than six panels in any twelve month period.

(b) The Director of Personnel will perform the initial screening of all applicants and will submit the most qualified individuals for interviews before the panel, provided that Boston Housing Authority employees who apply for a position and who meet the minimum qualifications for a position will be interviewed by the panel.

(c) The interviewing panel will evaluate applicants using a format which will provide for general areas of inquiry and require written comments by each panel member. Upon completion of the interviews, the interviewing panel will attempt to reach a consensus on its recommendations to the Receiver/Administrator. If necessary, a secretary will be supplied to the panel to aid in the preparation of the recommendation. If no consensus is reached, each panel member will be responsible for making written comments on each applicant. The written comments will be available for review by the applicant, provided, however, that the name of any panel member who wrote his or her own comments will not be recorded.

(d) The interviewing panel's evaluations of applicants for a vacancy may be used to fill future vacancies for a period of up to 90 days from the date of the appointment to the first vacancy in a position, provided, however that a new panel may be convened earlier. Upon reconvening a panel within ninety days, all BHA employees who had been interviewed by the

original panel will be notified of the reconvened panel and, if the employee files a written request for an interview with the Director of Personnel, he or she will be interviewed by the new panel.

(e) The Receiver/Administrator will have discretion to choose from among the candidates interviewed by the panel. The Union may request and the Receiver/Administrator will supply, upon request, a written explanation for his selection of an employee from among the candidates interviewed by the panel. The Receiver/Administrator's choice of an applicant to fill a vacancy shall be subject to the provision of Section 1 and Section 2, Steps 3 and #2 of Article X of the Agreement, but no other provisions of Article X.

Management Trainees

(f) The Receiver/Administrator will establish a formal training program for Management trainees prior to the end of the Authority's current fiscal year.

(g) Management trainees will be selected by the Receiver/Administrator on the basis of an objective examination with written and oral components. The Union will be consulted on the contents of the examination and an observer selected by the Union may be present during the oral interview. Upon request, the Union is entitled to the examination grades for all applicants to the management trainee program.

(h) The Receiver/Administrator's selection of a management trainee will not be subject to Article X of the Agreement.

(i) When a formal management training program is instituted, as provided in Paragraph (f) herein, a BHA employee who is selected for the training program, may participate in the program and continue to be compensated at the grade level he or she held immediately prior to the commencement of the training program provided that successful applicants shall be compensated at not less than grade 5.

(j) The Authority will pay the cost of the HUD Housing Manager certification examination for all employees who must be HUD certified for continued employment in their present position with the Authority. The Authority will not pay for HUD examinations other than each employee's first examination.

(k) The Authority will provide training during the month of September for all employees who have decided to take the HUD Housing Manager Certification examination.

Review of Interviewing Panel

Reopener

(l) This Supplementary Agreement shall supplant the provisions of the Agreement which were the subject of the Reopener agreement dated May 9, 1980.

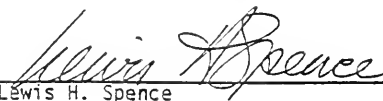
(m) The Receiver/Administrator or his designee and the Union shall review the operation of this Supplementary Agreement six months after the Union has ratified the procedure as established herein.

(n) The Union may request the Receiver/Administrator to reopen negotiations on this Supplementary Agreement no earlier than nine months after the Union has ratified the procedure as established herein. Upon receipt of the Union's request, the Receiver/Administrator shall reopen and commence good faith negotiations concerning this Supplementary Agreement.

(o) Except as required herein, the terms of the Agreement shall be continued in full force and effect.

IN WITNESS WHEREOF, the Authority by its Receiver/Administrator and the Union, by its duly authorized representative, have caused this instrument to be signed and executed, effective the day, month and year as approved above.

Boston Housing Authority
By its Receiver/Administrator


Lewis H. Spence

International Brotherhood
of Teamsters, Chauffeurs,
Warehousemen and Helpers
of America, Local 122 by
its business agent.

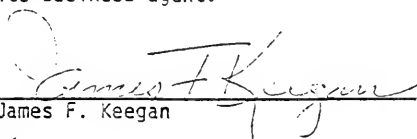
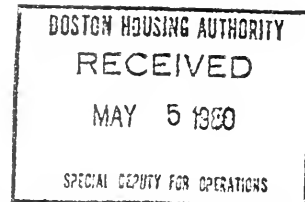

James F. Keegan

EXHIBIT 3

JOHN COCHRANE CENTRAL MAINTENANCE REPORT



TO: David Gilmore, Special Deputy for Operations
FROM: John Cochrane, Consultant *JC*
DATE: May 2, 1980
SUBJECT: Final Report (Phase I) Maintenance Analysis and Evaluation

This is a final report that represents a continuation of and is in conjunction with the interim report dated 4-6-80 that will serve as a terminus to Phase I (Preliminary evaluation and analysis of current maintenance systems).

Additional tasks assigned and reviewed (each with a report on the findings) have been:--

1. Gutter/Downspout Modernization (Annapolis)--Report dated 4-13-80.
2. Boiler repair work (Mission Hill Extension)--Report dated 4-20-80.
3. Roof drain service evaluation (Commonwealth)--Report dated 4-28-80.
4. Structure sealing procedure (Authority-wide) critique--
Review dated 4-20-80 and 4-30-80.
5. Project based maintenance evaluation:--in particular, at Charlestown, Cathedral, Orchard Park, East Boston, Mission Hill, and Mission Hill Extension.

Phase II (major in depth activities to complete evaluation and implement corrective action) is proposed as follows:

1. Continue in-depth needs assessment and evaluation of Project/District based maintenance which will include:--
 - A. Formulating programs and procedures that will serve to revitalize work order request systems, provide accountability and timeliness of services rendered. These activities must include redefinitions of responsibilities (particularly for managers) and an in-service training program covering work motivation and public personnel administration for managerial/supervisory employees.
 - B. Formulating and initiating managerially conducted annual living unit inspection programs and developing for implementation uniform standards of living unit rehabilitation.
 - C. Evaluate existing maintenance employees--their capabilities and performance with an emphasis on redefining task assignments and methods presently employed to abate deficiencies.
 - D. Develop and implement preventive maintenance service programs at family developments. (Inspection/Service Procedures).
2. Preliminary structuring of resident self-help maintenance staff, facility and service.
3. Establishment of an inspection unit to assist in attaining and maintaining behavior consistent with the administration's directives, suggestions and policies.

Proposed Program (Phase II) Schedule

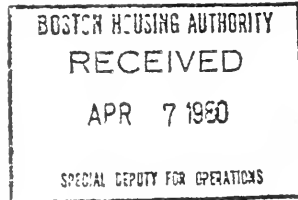
- 1-A --- 18 weeks at an average 8 work hour per week input.
- 1-B --- 30 weeks at an average 12 work hour per week input.
- 1-C --- 18 weeks at an average 16 work hour per week input.
- 1-D --- 12 weeks at an average 4 work hour per week input.
- 2 & 3 -- Because these items will better serve the Authority and residents after items 1 (A - D) are well underway, I propose that no more than 120 additional work hours be expended over the remainder of 1980 if these assessment findings are attained on a reasonable schedule.

In summary, I propose a contract to assist in producing all of the above on a consultant basis under the direction and assignment of the Special Deputy of Operations. The intent is to accomplish the goals defined by December 31, 1980 at a figure not to exceed \$24,000. on a schedule utilizing a 30 week format at a rate of 24 to 32 hours per week. The hourly rates and invoicing/payment parameters are to be the same as the contract for Phase I.

With your approval, the final invoice for Phase I will be tabulated on May 9, 1980 (the one week extended termination date).

Thank you for this opportunity. I have received much meaningful assistance from several of the BHA employees--in particular, Mary Kelly and Michael Mullan.

TO: David Gilmore, Special Deputy for Operations
FROM: [John Cochrane] Consultant *Jc*
DATE: April 6, 1980
SUBJ: Preliminary Evaluation and Analysis - Maintenance



This is an interim report that sets forth a brief summary of my activities, findings and suggestions as they relate to the preliminary investigation of the current maintenance systems, i.e., Central, District and Project based, at the Boston Housing Authority under the terms of our contract dated March 7, 1980.

In undertaking this evaluation and analysis I have:--

A. Read copies of:--

1. Management Transition Paper (plus exhibits) dated 10-4-79 - Merrill to Feeley.
2. Central Maintenance Status Report dated 2-11-80 - Jennette to Spence.
3. Central Maintenance Goals Report dated 2-28-80 - Jennette to Gilmore.
4. Coopers and Lybrand Report dated 1/80. (Very informative as far as it went).
5. Consent Decrees and Operating Procedures--Maintenance Department, Volumes I and II.
6. Director of Central Maintenance's file regarding boiler repair at Mission Hill Extension.

B. Reviewed copies of:--

1. Print outs of Personnel for both Management and Central Maintenance.
2. Collective Bargaining Agreements (4).
3. State of the Family Development Report issued by Planning.
4. Job Descriptions of Managers.
5. Occupancy Statistics dated 3-14-80.
6. Central Maintenance Field Report (worthless).
7. Boiler Room Technical and Inspection Report (virtually unknown).
8. Report on condition of Vacated Apartments.

C. Toured the maintenance facilities and a few restored living units at:--

1. Kemp Street (Central Maintenance).
2. Mary Ellen McCormack
3. Old Colony (twice)
4. Charlestown
5. West Broadway ("D" Street)
6. Archdale
7. Washington/Beech
8. Mission Hill Extension (boiler room only)

While all of the above is representative of but a small sample in a large organization, it, to date, has served well as an indicator into the deficiencies prevalent regarding the behavioral dynamics in management and maintenance at the Boston Housing Authority, viz.:--

A. Preliminary Findings

1. Operative employees require (lack) the will and capacity to conform and achieve. This includes some supervisory and administrative personnel interviewed.
In addition, the physical as well as the job classification capabilities are in serious doubt given the best of direction.
2. Employees in leadership capacities in many instances lack personnel motivation techniques consistent with administrative directives and suggestions. A strong tendency to denigrate the other Department, Division, Section, Individual, etc. is outstanding.
3. Inadequate (non-existent?) standards and/or their implementation for living unit occupancy preparation work is obvious.
4. Maintenance facilities (project based) are hazardous due to improper storage, sawdust, smoking, debris and leisure furnishings such as stuffed chairs. In short their working environment is chaotic.
5. Insufficient and inefficient control/direction of the project based work force by supervisors. They tend to 'unload' work orders by the wad while maintaining poor accountability as to priority assignments or work product quality.
6. Inadequate inter-departmental communications. Some reports are not used, received or of any constructive use.
7. Work order intake/distribution system is haphazard and borders on the ridiculous.
8. Inadequate (non-existent?) supply/parts control, storage, inventory and availability. There is a sharp division on the use and availability of these items between project-based maintenance and central maintenance.
9. Corrective action is being performed in an untimely manner.
(Sewer work at "D" Street).
10. Central Maintenance services fail to satisfy the District and project-based maintenance needs.

B. Immediate Needs

1. Sewer waste line replacement at "D" Street forthwith-(requires a major programmed assignment of personnel and responsibility).
2. Detect and discourage deviations from the Authority's objectives by direct direction, daily/routine inspection of work performed and periodic investigation audits aimed at motivating personnel to attain the desire to achieve.
3. Clean up and place in safe, efficient operating order all maintenance shops and storage areas. (Cite the electrician's shop at M. E. McCormack as the minimum acceptable standard).
4. Redirect the activities and services of the Central Maintenance- in particular the Director's attitudes and work activities. (Already in process in a very effective manner under the direction of the Special Deputy for Operations).

5. Formulate and promulgate specific standards for living units being prepared for reoccupancy. (Coordinate these efforts with the Housing Inspection Department--obtain inspections at time of occupancy).
6. Inventory, organize, control and utilize the stock of parts and supplies at Project-based maintenance facilities.

C. Identified Needs (Suggestions)

1. Continue the analysis and evaluation of Central Maintenance to effect a more meaningful turnaround in rendering services to Departments and Residents.
 - To include, but not limited to:--
 - A. Mission Hill Extension Boiler Repair Contract
 - B. Elevator Service Coordination
 - C. Heating Plant work activities
 - D. Heating Plant Training Program
 - E. Automotive Service
 - F. Pest Control Program
 - G. Living Unit Restoration
 - H. Board-up Program
2. Formulate and conduct work performance tests for each agreed upon job classification for all operating personnel. A prerequisite to this must be a rigorous physical examination. Because the actual physical tasks of carrying out the Authority's objectives falls upon the persons at the lowest levels of the administrative hierarchy the laborer and skilled craftsman must be the main focus of attention. (The average age of the 127 laborers at BHA is currently 45.2 years with some individuals in the mid to upper 60's and only 47 aged 40 or under).
3. Initiate mandatory in-service training program in Public Personnel Administration for all managerial and supervisory personnel. (Failure to attend and attain acceptable standings of motivational and communicational skills must be made grounds for dismissal or demotion).
4. Revitalize the work order request system so that the Program is oriented more toward work completed (and accepted) as against the present standards of work requests received and stock piled.
5. Centralize the authority and responsibility for attaining and maintaining an acceptable living environment on a uniform basis around the Manager who should be required to live-in and to be of sufficient status to enable clear direction of all maintenance personnel-particularly Superintendents.
6. Formulate and initiate a managerially conducted Annual Living Unit Inspection Program.
7. Establish a resident self-help maintenance assistance facility (Central Maintenance?) that will serve in such areas as living unit painting, minor plumbing repairs, fixture repair, etc. by providing timely advice, inspection, tools, supplies, assistance, direction and encouragement.
8. Establish an inspection unit answerable to the top administrator that will be responsible for generating behavior consistent with the administration's directives and suggestions by detecting and discouraging deviation and by establishing standards, procedures and qualities through training programs, audits, routine inspections all of which are on a programmed format, i.e., preformed decision basis to maintain uniformity of actions taken.

EXHIBIT 4

DEVELOPMENT-BASED WORK ORDER PROGRAM DRAFT

PRELIMINARY PLANNING PROPOSAL
FOR DEVELOPMENT STORES PROGRAM:

200-1, 200-11, 2-3

For Comments

Attachment

Form 100-1, 100-2, 100-3, 100-4, 100-5, 100-6, 100-7, 100-8, 100-9, 100-10, 100-11, 100-12, 100-13, 100-14, 100-15, 100-16, 100-17, 100-18, 100-19, 100-20, 100-21, 100-22, 100-23, 100-24, 100-25, 100-26, 100-27, 100-28, 100-29, 100-30, 100-31, 100-32, 100-33, 100-34, 100-35, 100-36, 100-37, 100-38, 100-39, 100-40, 100-41, 100-42, 100-43, 100-44, 100-45, 100-46, 100-47, 100-48, 100-49, 100-50, 100-51, 100-52, 100-53, 100-54, 100-55, 100-56, 100-57, 100-58, 100-59, 100-60, 100-61, 100-62, 100-63, 100-64, 100-65, 100-66, 100-67, 100-68, 100-69, 100-70, 100-71, 100-72, 100-73, 100-74, 100-75, 100-76, 100-77, 100-78, 100-79, 100-80, 100-81, 100-82, 100-83, 100-84, 100-85, 100-86, 100-87, 100-88, 100-89, 100-90, 100-91, 100-92, 100-93, 100-94, 100-95, 100-96, 100-97, 100-98, 100-99, 100-100

I. ~~Development of the Development Stores Program~~

II. ~~Development of the Development Stores Program~~

III. ~~Development of the Development Stores Program~~

IV. Summary of Estimated Budget for Development Stores Program

V. Attachment (A) - Example of : Stock Requisition;
Purchase Requisition
Receiving Report

Attachment (B) - Example of : Completed Work Orders
Time Cards

Attachment (C) - Example of : Basic Data for Broadway Development
(200-1) which includes: Material and
Labor Estimates for Improvements and
Security Estimates

Attachments (D)- Example of : Basic Data for East Boston Development
(2-8) which includes: Material and
Labor Estimates for Improvements and
Security Estimates

Attachments (E) - Example of : Basic Data for Franklin Field Devel.
(200-11) which includes: Material and
Labor Estimates for Improvements and
Security Estimates

Attachment (F) - Example of: Stock Control Card (No form number)
Stock Requisition - BHA 206

Attachment (G) - Example of: Geographic Proximity Diagram

A broad range of developments, including Pilot Programs, are being developed by the U.S. Army, Navy, and Air Force, and by other departments operated by the U.S. Army. These Development Stores will be providing stock to developments having a wide ^{range} ~~range~~ of total living units, i.e. from seventy-two residential units to approximately one thousand and four units, together with varied physical conditions, varied maintenance capabilities, topographical features and varied levels of resident participation and support of management. All of these major factors were considered in the ~~the~~ draft of the Development Stores Program's design.

When taking the above factors into consideration some refinement of the ^{overall} Development Stores program will be implemented in a minimum of three stages and two specific design functions over a period of six months. The first group of developments will be selected from either the "Pilot Programs" or from the Development Stabilization Programs; the second group will consist of developments that are stabilized, but a greater emphasis will be made on maintenance and preventive maintenance; and finally the third group of developments would be stabilized with sufficient current maintenance activity, but would benefit from a small stores program.

There are a number of different categories of maintenance functional needs for Development Stores. These functional service needs may be divided into levels of stores as follows:

Level I Development Stores - a Stores area capable of servicing more than one development in one or more trade supplies, and located geographically close to one or more developments requiring specific trade stock items that it is responsible for stocking. This Development Stores could be considered a District Maintenance Stores Facility, because it would stock items that may not be used on a daily basis at any one of the assigned developments.

Level I Development Stores would provide supply for the development, including the development's stock, and the maintenance of the stock. The development's stock would be maintained on a daily basis.

30 day
would feature a limited supply of stock representative of all trades and stock items used specifically on a daily basis in those developments.

These modifications will reduce the short and long term expenditures associated with the minimum standard set for Development Stores Program's equipment and physical improvements, and the extensive security improvements required in a substantial number of developments. Under this modified plan for identifying Level I and II Project Stores, locations will be identified in Attachments C, D, and E. The Central Stores department would continue to be the major centralized stock facility. All of the Stores Areas located on the development would be the responsibility of Field Management departments. These stores area would function under the immediate responsibility of the Housing Manager. The goals, operational procedures, and actual implementation as identified in the following sections:

The Development Stores Area for Broadway 200-1, East Boston 2-8, and Franklin Field 200-11, will each have one Maintenance clerk responsible to maintain control maintenance supplies ^{materials}, equipment for the development. Any of the development Stores Area that may be planned will be based upon the successful implementation and ^{development} experience records of this first group. The Maintenance Clerk will be assigned to work with the Superintendent of Maintenance on day to day activities, and he will provide a written report of all his/her activities to the Housing Manager no less than one time a week. This procedure is suggested to give the Housing Manager a direct source of information.

Job Description of Maintenance Clerk:

On the next pages, please find job descriptions for both the present Work Order Clerks, Grade 6, and the proposed Maintenance Clerks, Grade 4.

SALARY = 3 GRADE. JOB PRICE = 6 - 10.712
 = 211.558

JOE RESOLUTION:

Under the supervision of an Area Maintenance Supervisor, processes Work Orders, analyzes Computer Reports concerning Work Orders, assists the Supervisor in prioritizing work distribution, and preparing receiving reports for all material delivered from vendors to the Components. Assists the Supervisor in ordering material for the Maintenance Shop and performs other duties as assigned.

TYPICAL CURVE SHOWN:

Employees work with mainly by telephone, from a staff for maintenance work. Obtaining all relevant information from the register is necessary for a computer to accomplish and Work Programs in Work Orders with the information is used for the preparation by the company. Orders are Work Orders exists in order to eliminate deficiencies and services and also, information is provided in responding to studies of Work Orders. In response to calls for technical and Working Orders, staff information covering the status of Work Orders. Employees computer requests to screen out duplicate Work Orders and monitor reporting is completed Work Orders.

Prepares and forwards receiving reports for bulk material delivered by vendors to the developing co. Gives assistance to the Area Maintenance Supervisor in processing Work Orders, in stockpiling, in ordering material for the maintenance men, and other duties as assigned.

UNITED STATES DEPARTMENT OF JUSTICE

Must have the ability to perform a required information from sources for maintenance service and to write the information in the proper format for computer processing. The job requires that in dealing with clients, ordering and supervising. Must have the ability to write and understand the needs of the clients and computer reports for service and maintenance and for handling order and the U.S. Courts.

171-111

GRADE 4

\$12,741

MAXIMUM: \$14,031

GENERAL DESCRIPTION:

Under the general supervision of an Assistant Manager for Maintenance Service I or housing manager, the Maintenance Clerk I is responsible for preparing Service Requests, maintaining maintenance and stock control records, and performing occasional field inspections for a local management center including over 750 family housing units.

TYPICAL EXAMPLES OF WORK PERFORMED:

Receives and responds to all calls requesting maintenance service, prepares service request forms, maintains individual unit maintenance records, forwards material to Data Processing. Assigns priority on maintenance requests subject to review by supervisor. Files copies of service requests in appropriate areas. Arranges work dates with tenants as required by supervisor. Processes and files all completed work orders.

Maintains perpetual inventory of stock. Issues individual stock items. Requisitions stock to maintain minimum inventory level or to fill special orders. Tracks stock requisitions. Controls access to stock area. Occasionally performs inspections of apartments to identify deficiencies.

Performs such other duties as may be assigned by immediate supervisor.

MINIMUM QUALIFICATIONS:

High school or vocational school certificate or equivalent. Must be able to read and write clearly. Must have knowledge of tools and materials commonly used in building maintenance. Must have patience in dealing with people and be able to maintain courtesy and tact. Must be able to communicate effectively. Must have good judgement, initiative and ingenuity. Must understand the concerns of low income families and respect and appreciate diverse cultural backgrounds. Must have strong organizational and administrative skills.

EXPERIENCE:

Four years work in a maintenance capacity or in a clerical capacity with primary responsibility for responding to tenant inquiries. Prior experience must demonstrate qualities required by Minimum Qualifications.

ANNUAL: \$10,723

MINIMUM: \$12,569

GENERAL DESCRIPTION:

Under the general supervision of an Assistant Manager for Maintenance Services II, or housing manager, the Maintenance Clerk II is responsible for preparing Service Requests, maintaining maintenance and stock control records and performing occasional field inspections for a local management center including under 750 family or senior citizen housing units.

TYPICAL EXAMPLES OF WORK PERFORMED:

Receives and responds to all calls requesting maintenance service, prepares service request forms, maintains individual unit maintenance records, forwards material to Data Processing. Assigns priority on maintenance requests subject to review by supervisor. Files copies of service requests in appropriate areas. Arranges work dates with tenants as required by supervisor. Processes and files all completed work orders.

Maintains perpetual inventory of stock. Issues individual stock items. Requisitions stock to maintain minimum inventory level or to fill special orders. Tracks stock requisitions. Controls access to stock area. Occasionally performs inspections of apartments to identify deficiencies.

Performs such other duties as may be assigned by immediate supervisor.

MINIMUM QUALIFICATIONS:

High school or vocational school certificate or equivalent. Must be able to read and write clearly. Must have knowledge of tools and materials commonly used in building maintenance. Must have patience in dealing with people and be able to maintain courtesy and tact. Must be able to communicate effectively. Must have good judgement, initiative and ingenuity. Must understand the concerns of low income families and respect and appreciate diverse cultural backgrounds. Must have strong organizational and administrative skills.

EXPERIENCE:

Two years work in a maintenance capacity or in a clerical capacity with primary responsibility for responding to tenant inquiries. Prior experience must demonstrate qualities required by Minimum Qualifications.

POLICE DISTRICTS

TO BE RE-ORGANIZED

PROPOSED CHANGES
First District

DISTRICT I

Old Boston 2-1
Commonwealth 200-3
Faneuil 200-4
East Boston 2-8
Orient Heights 200-8

I
I
II
I
II

"Pilot"

DISTRICT II

Old Colony 2-24
M.E. McCormack 2-23
"D St." 200-1

I
II
I

"Pilot"

DISTRICT III

South End 2-6
Lenox St. 2-4
Whittier 2-11
Camden 200-2
Orchard Park 2-5

I
I
II
II
I

DISTRICT IV

Mission Hill 2-3
Miss. Hill Est. 2-14
Archdale 200-7
South St. 200-12
Beech St. 200-13

I
I
I
II
II

DISTRICT V

Fairmount 200-5
Gallivan Blvd. 200-10
Franklin Field 200-11
Franklin Hill 2-9
Franklin Fld Bld 200-12
Columbia Point 2-11

II
II
I
II
II
I

"Pilot"

DISTRICT VI & VII

Elderly - Codman

I

The scope of the implementation of the program will be the BHA located on the West 7th Street (Seaside) site for improvement of the existing Stores Area and a Security analysis report prepared by the Security Department. These reports are enclosed as Attachment A, C, D, and E.

During the survey and evaluation process at existing facilities at Broadway, East Boston, and Franklin Field, the Housing Manager and/or Superintendent of Maintenance were asked questions about these stock and maintenance needs and plans. Prior to this on site survey a written report of equipment and refurbishment needs was requested and the completed inventories received, that included a written list of Stock Inventory needs for thirty days. An estimated cost of this requested inventory list was calculated. These estimated costs are more specifically dealt with in Attachments C, D, and E included in this report.

Inventory Control

The maintenance and control of inventory directly affects the availability of supplies to craftsmen and tradesmen working at each development, and as a whole directly affects the BHA's maintenance expenditures. It is because of the former facts that the Maintenance Clerk will be given the full responsibility for accounting for material received and expended at the development. S/he will be held responsible for material received and placed under their control. In order to prevent circumvention of inventory controls, the Maintenance Clerk will be requested to report to the Housing Manager who is ultimately responsible for all actions or inactions of his staff and the maintenance of the development. Without exception, the Maintenance Clerk will not distribute nor ^{release} ~~convey~~ stock for other's use. S/he will not order, nor issue stock or equipment to any BHA employee regardless of Grade, or to tenants without receiving the proper authorized signatures. These authorized signatures being the Housing Manager, Superintendent of Maintenance, and craftsmen/tradesmen identified by the Housing

in order to be responsible for the authorized inventory control. These will be limited to the Housing Manager and/or Superintendent, for tenants to receive paint, and shades and other items specified in writing.

Although, the Housing Manager has ultimate responsibility for the effectiveness of the Maintenance Clerk's implementation of authorized inventory control procedures, the District Director will be responsible for reviewing and enforcing inventory controls through the Housing Manager. The District Director will routinely receive reports furnished to the Housing Manager, Superintendent of Maintenance from the Maintenance Clerk and Electronic Data Processing Inventory and Work Order Reports.

Organization of Stock Area(s)

A uniform system of labeling stock and organizing stock in Stores Area will be implemented. All stock will be organized according to craft requiring that inventory with the exception of bulk items that will be stored in shops or adjacent to shops, and will be kept together and will be stored in a uniform manner. For example: paint will be stored by color, size, category (exterior, wall, ceiling), while plumbing fixtures, elbows, tees, connectors, will be organized by sizes, for example, 1/4, 1/2, 3/4, or 1".

All Stores Areas will have doors, with locks. These doors will remain locked at all times. Spare keys will be maintained in a specially identified sealed envelope with the Housing Manager's and Maintenance Clerk's signatures. This envelope containing the spare key will be kept in the vault with the District Director, Housing Manager, and Superintendent of Maintenance having knowledge of its location. Another spare key will be maintained in the Central Office's Master Key sets in a specially identified and sealed envelope, again with the

The Spare Key is used at the discretion of the Housing Manager. The Spare Key will be filed with the Housing Manager, and Maintenance Clerk. The Maintenance Clerk will re-inventory the spare key after it has been used by authorized personnel, as s/he is the manager and the designated individual. The Manager and Maintenance Clerk in absence of the Superintendent of Maintenance will use the spare key to gain access to supplies. The Manager and Superintendent will follow the procedures for receipt and issuance of stock items in the absence of the Maintenance Clerk.

An Authority-wide policies will need to be established and implemented concerning the assignment/issuances of tools (and responsibility to provide them), control, and return of Bottled Gases (Oxygen) and procedures for issuance of chemicals such as pesticides.

Receipt, Issuing, and Reconciling Stock Items

The ordering of supplies, material, and equipment for the development from Central Stores and/or outside vendors will be the responsibility of the Maintenance Clerk, subject to review by the Superintendent and approval of the Housing Manager.

Stock requested will be recorded manually on Inventory Control Cards maintained by a card file system. These Inventory Control Cards will be adjusted as stock is received and issued on a daily basis. These adjustments will be made each time stock issued from the Stores facility to a craftsman upon receipt of his signature on a Stockroom Requisition form BHA 206. No stock will be issued without a Work Order being given to the craftsman, that includes a description of the job and work site and the "Material Used" section completed with ^{a list} containing the same items as listed as being issued to craftsman signed "Stockroom Requisition" Form BHA 206. The procedural steps involved are more completely explained on the Proposed Procedural for Stores Program from Work Orders section of this preliminary proposal.

Orders, Time Cards, and Inventory Control Cards, which will reduce the number of occasions where information is omitted, incorrect entries, and establish more continuity in the development of work schedules, inventory control and estimation cost. Therefore this basic data will be more reliably collected and forwarded to Electronic Data Processing, for Management Information System Reports (M.I.S.). These proposed changes should reinforce the existing manual system and make it more readily adaptable for data input into electronic data that will service as the basis for various Management Information System Reports relative to Work Orders, Inventory cost, expended materials, and labor cost, etc. By cross-referencing various Central Stores and Project Development Stores data, the Authority will be able to have the initial step towards "field stock accountability" it needs.

Concepts for Forward Planning

The inventory reorder control concepts that will later be considered to replace the present Stock Requisition Form 120 preparation is the development of a typical development Electronic Data Processing produced list of previously requested by stock ^{category} ~~are inventory~~ for thirty days, ^{based} ~~based upon prior reordering~~ expenses. This ERP list would be received monthly by the Maintenance Clerk and it would serve as an open "Grocery List" of supplies for reordering stock. The Maintenance Clerk will enter on appropriate lines the quantity of Stock desired, ~~based upon the~~ ^{as} ~~order prices indicated on his cards.~~ (Note: A special report would indicate stock remaining according to records received from the development showing expended items, subtracted from earlier actual count inventories conducted at the developments.) These annotated "Grocery Lists" will already have stock codes taken from the Central Stores Stock Catalogue. The Maintenance Clerk would retain the completed Grocery Lists carbon copy and forward the new

list and changes to the electronic development, with an existing inventory station at Central Stores. A new "grocery list" of items sent is printed by a printer (to be installed), and is shipped together with stock to the development. This new listing, which arrives with the shipment, can be used by the Clerk to check the shipment, and update the Inventory Control cards. The current manual system for rectifying errors, unfilled orders, etc. has to be rewritten to accommodate electronic data processing requirements.

As the Authority increases its computer sophistication, and capabilities, Maintenance Clerks at the developments could use a Computer Stores Terminal similar to monitor and input their data and receive visual data. This terminal could be used by the Management Office to secure management data regarding work orders, and other pertinent data regarding their developments management activities.

Relationship of Central Stores to Project Stores

Upon implementation of the Project Stores Program Central Stores will operate as a warehouse Stock Distribution Center. During the implementation of the Project Stores Program, the Central Stores department will need to rapidly accumulate new data on individual development reorder points. The stock usage system must include procedures for obtaining information regarding special development maintenance projects that would affect the reorder points in order to insure that 45 to 60 days supply of materials and stock is available. During the planning, the delivery schedule to each facility will be refined.

The major reason for establishing a development stores program is to assure appropriate stock on hand at the development, limit travel time, and craftsmen time used adapting or repairing worn parts. Therefore, Central Stores will no

If the item is not in stock, the Manager/Supervisor will write a memo to the District Director of the facts and intra, and then interdepartmental action will determine the proper actions to be taken.

TELEPHONE PLANNING PROGRAM FOR
NEWLYWEDS STUDIES PROGRAM

(Broadway 200-1, Found in Field 200-11, East Boston 2-8)

(PLATEJOURNAL)

DEVELOPMENT STORES PROGRAM

IN THE CASE OF DEFECTIVE
PARTS AND SUPPLIES

If defects or damage to items was discovered after acceptance from supplier or Central Stores, the item(s) should be stored and the Housing Branch / Superintendent will notify responsible parties in writing, and request adjustment inventory upon further surmounting defective parts to Central Stores and/or vendor.

IN CASE OF EMERGENCY

f. All Emergency requests from suppliers from Central Stores will be directed through the development Housing Manager who will follow the orders as given by District Director responsible for his/her District. He/she will maintain a file of these incidents

USE OF PETTY CASH for Emergency

- a. All such emergency instances requiring expenditures from the Petty Cash Account shall be well documented giving when? how? why? reasoning.
- b. Receipts for expenditures shall be kept and utilized for procedures outlined in accounting for Petty Cash.

MAINTENANCE STORES PROCEDURES

SUPPLY

The Maintenance Clerk will be responsible for:

- recording, logging and maintaining an accurate record of all stores delivered to the depot.
- recording, logging and maintaining accurate records of all equipment (tools) used in the Maintenance area by craftsmen, loaned by BWA.
- taking work orders by telephone and as needed in person at the office, and properly complete and all portions of the work order.
- working at the discretion of the Housing Manager/Superintendent, routinely inspects apartments with complaints in order to better ascertain what craft and tradesman and material are necessary to complete the work.
- Performing other work as may be she/he may be directed to perform within the scope of their job description.
- accepting work orders assigned by the Superintendent and distribute work orders as indicated by Superintendent and distribute supplies as outlined in procedure to craftsmen and other authorized personnel (i.e., Housing Manager, Superintendent)
- upon receipt of completed work order, calculate material used cost, and generally see that all information is complete and returned to Superintendent.
- As a routine part of the job, maintain his working area by keeping area orderly, clean and free from debris and be sure to keep their area free of supplies except what supplies are specifically stored.
- regularly rotate stock to prevent deterioration by chemical action, such as paint and other chemicals.
- Knowledge of basic methods of storage to prevent damage to stored items, its cause of excess cold, heat, moisture, etc.

RECOMMENDED MINIMUM STANDARD SQUARE FOOTAGE FOR DEVELOPMENT
STORES AREA

Explanation: The estimates, listed below, have been considered on the basis of 100 sq. ft. per item. These areas may be reduced or increased, depending upon the size of the lot and the number of items to be stored, and the condition of the lot. They must be stored.

| <u>FUNCTION AREA</u> | <u>SQUARE FOOTAGE</u> |
|----------------------------------|-----------------------|
| I. Desk Area for Clerk (10'x10') | 100 |

| <u>SUPPLY AREA</u> | <u>SQUARE FOOTAGE</u> |
|---|-----------------------|
| * 1. Carpentry (7'x7') (Except Bulk Lumber) | 49 |
| 2. Electrical Supplies (10'x10') (Except Exterior Fixtures & Conduit Pipe) | 100 |
| 3. Glazing (6'x6') | 36 |
| 4. Janitorial Supplies (12'x12') | 144 |
| 5. Masonry Supplies (10'x10') (Block, Brick, Ceramic Tile, Grouting materials, Adhesives, mortar mix, etc.) | 100 |
| 6. Painting Supplies (10'x12') | 144 |
| 7. Plaster (8'x8') (Pallets of finish plaster, Sand Mix, Accelerant, Wire Lath) | 64 |
| * 8. Plumbing (10'x10') (Except lengths of Pipe to be stored in Plumbing Shop) | 100 |
| * 9. Steamfitting Supplies (10'x10') (Except lengths of Pipe to be stored in Plumbing Shop or Steamfitting Shop) | 100 |

| <u>FUNCTION AREA</u> | <u>SQUARE FOOTAGE</u> |
|--|-----------------------|
| 10. Aisles for pick-up & Work Area = 100 sq ft all Stores Area | 132 |

Suggested Minimum
for Development
Stores Area 1075 Square Feet

*Stored in Shop Area

SUMMARY OF ESTIMATED COSTS FOR

DEVELOPMENT STORES - INITIAL

~~-----~~
~~-----~~

Development Stores:

| | | | |
|---------------------------------|--------------|---|--------------|
| a. Broadway (200-1)..... | \$7,700 | - | 8,150 |
| b. East Boston (2-8)..... | 1,800 | - | 2,500 |
| c. Franklin Field (200-11)..... | <u>3,500</u> | - | <u>4,100</u> |

Sub-Totals 13,000 -14,750

(Note: Attachment: C,D, and E)

2. Estimated Security Improvement Cost

| | | | |
|---------------------------------|--------------|---|--------------|
| a. Broadway (200-1)..... | 5,200 | - | 5,700 |
| b. East Boston (2-8)..... | 6,500 | - | 7,800 |
| c. Franklin Field (200-11)..... | <u>3,000</u> | - | <u>3,600</u> |

Sub-Totals 14,700 -22,100

(Note: Attachment: C,D, and E)

3. Sub-totals of 1, 2

| | | |
|---------------------------------------|---------------|----------------|
| a. Equipment Estimates Sub-total..... | 13,000 | -14,750 |
| b. Security Estimates Sub-total | <u>14,700</u> | <u>-22,100</u> |

Estimated Cost for Improvements ..27,700 -36,850

(Note: Attachment: C,D, and E)

II. Estimated Cost of Inventory for Development Stores

| | | | |
|--|--------------|---|--------------|
| a. Broadway (200-1) (to be amended)... | 1,500 | - | 5,000 |
| b. East Boston (2-8)(to be amended)... | 7,200 | - | 7,200 |
| c. Franklin Field (200-11)..... | <u>4,400</u> | - | <u>4,700</u> |

Estimated Sub-Totals 13,100 -16,900

III. Total Estimates

1. Improvements and Equipment

a. Office and Stores Area Equipment & Improvements

\$13,000 - 14,750

b. Security Equipment and Improvements

\$14,700 - 22,100

\$27,700 - 36,850

c. 30 Day Stock Inventory

\$13,100 - 16,000

13,100 - 16,900

TOTAL ESTIMATED COST \$40,800 - 53,750

6/11/60

ATTACHMENT A

Example of : Stock Requisition
Purchase Requisition
Receiving Report



DATE: JAN 2 1964 FLORENCE

DEVELOPMENTAL CENTER

ITEM OR SERVICE REQUIRED

DATE FILED OR SERVICE REQUIRED

(Do not use if item is purchased)

NO. 100-100000-100000

PURCHASE REQUESTION
(THIS IS NOT A PURCHASE ORDER)

CITY OF NEW YORK

CITY OF NEW YORK

CITY OF NEW YORK

CITY OF NEW YORK

CITY OF NEW YORK

CITY OF NEW YORK

CITY OF NEW YORK

CITY OF NEW YORK

CITY OF NEW YORK

CITY OF NEW YORK

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CITY OF NEW YORK

CITY OF NEW YORK

CITY OF NEW YORK

CITY OF NEW YORK

CITY OF NEW YORK

CITY OF NEW YORK

DEPT./DEV. NO. DEPT. DIV. NAME: PURCHASE ORDER NO.

Mfg. or Dist. Head user Limit items on each requisition to one class of material Account No. SHIPPING ADDRESS

Date Issued Date Material Required Issued By Approved By

| Cogn. | Unit | STOCK NO. | DESCRIPTION AND/OR SPECIFICATIONS | | Vendor Part No. | Est. Unit Cost | Cost Vendor #1 | Cost Vendor #2 | Cost Vendor #3 | EXTENSIO |
|--------------------------|--|---|---|--|--------------------------------------|--------------------------|----------------|----------------|----------------|----------|
| | | | | | | | | | | |
| NUMBER OF UNITS REQUIRED | UNIT SIZE (example: - each, dozen, gross box.) | IDENTIFYING CENTRAL STORES STOCK NUMBER, IF KNOWN | ENTER DESCRIPTION OF ITEMS NEEDED. INCLUDE BRAND NAME, MODEL, SIZE, WEIGHT OR DIMENSIONS, IF POSSIBLE. IF ORDERED FROM CATALOG, INDICATE CATALOG NUMBER AND PAGE. | | MANUFACTURER'S PART NUMBER, IF KNOWN | ESTIMATED COST, IF KNOWN | | | | |
| | | | WHEN SERVICE IS REQUIRED, INDICATE TYPE OF SERVICE, LOCATION WHERE SERVICE TO BE PERFORMED, AND DESCRIPTION OF SERVICE. | | | | | | | |

For Buyer Use Only: Review and Approval

Review and Disapproval

TOTAL

For Purchasing Dept. Use Only

| NAME | Vendor #1 | Vendor #2 | Vendor #3 |
|----------|-----------|-----------|-----------|
| ADDRESS | | | |
| CITY | | | |
| DELIVERY | | | |

Certification and Approval of Purchasing Agent:
The undersigned certifies that at least three bidders as listed above have been contacted for quotations on the attached purchase order.

Buyers Initials

Terms

COMMENTS: YOU MAY USE THIS SPACE:

IN THIS AREA, ENTER COMMENTS RELATING TO ITEM OR SERVICE REQUESTED (FOR EXAMPLE, WHOM TO CALL PRIOR TO DELIVERY, WHOM TO SEE FOR MEASUREMENTS OR SERVICE INFORMATION THAT WILL ASSIST PURCHASING AND THE VENDOR) IF ITEM OR SERVICE IS OF UNUSUAL NATURE OR IF DELIVERY OTHER THAN NORMAL. USE THIS SPACE TO ENTER SUGGESTED VENDOR NAME.

P. O. B.

Destination Shipping Point

Promised Delivery Date

Date to Buyer

Date Returned

Form PR 282-C

NOTE: BEFORE SIGNING A PURCHASE REQ. CHECK WHETHER FORM IS COMPLETE & CLEARLY WRITTEN

BOSTON HOUSING AUTHORITY

RECEIVING REPORT

No 86173

RECEIVED: In Good Condition

At _____
RECEIVING POINT

Date _____

From _____
NAME

ADDRESS

| DEV. NO. | PUR REQ. NO. | PUR. ORDER NO. |
|-------------|-----------------|-------------------|
| QUANTITY | UNIT | DESCRIPTION |
| | | |

Delivered by _____ Section _____

Received by _____

ALL SHIPPING MEMOS AND INVOICES RECEIVED WITH THE ABOVE ARTICLES SHOULD BE ATTACHED TO THIS REPORT.

ATTACHMENT A

Example of Completed
Work Orders
Time Card

SECTION HOLDING AUTHORITY - MAINTENANCE WORK ORDER

| | | | |
|------------------|--------------------|----------------------|--------------------|
| APPROVED BY: | | ASSIGNMENT NO. | |
| 1. ELECTRICIAN | 21. APPLIANCE | 22. PLASTER | 23. STEAKS FREE |
| 2. PLUMBER | 24. LATH & PLASTER | 25. PAINTER | 26. WELDER |
| 3. CARPENTER | 27. CARPENTER | 28. PLASTER | 29. MANAGER ACTION |
| 4. MODERNIZATION | 30. ELECTRICIAN | 31. PLUMBER | 32. INSPECTION |
| 5. SAFETY | 33. FIREMAN | 34. ROOFER | 35. ENGINEERING |
| 6. SECURITY | 36. GLASSER | 37. SITE & STRUCTURE | |

APPROVED BY: _____ DATE: _____

CLASSIFICATION: _____

CRAFT & DESCRIPTION CODE NO.: _____

WORK ORDER WRITTEN BY: _____

DESCRIPTION OF WORK REQUIRED: _____

Area: _____

Workman assigned to job: _____ Date & time assigned: _____

BLUE - Foreman & Data Processing WHITE - Data Processing YELLOW - Tenant PINK - Area Maintenance Office

43 1/2 hrs. for job
Sum of 12 hours

| MATERIAL USED | | STOCK NO. | DESCRIPTION | Quantity | Unit Price | Exten. Price |
|------------------------------|--|-----------|-------------|----------|------------|--------------|
| <p>2201</p> | | | | | | |
| <p>EMPLOYEE NO. _____</p> | | | | | | |
| <p>LABOR TIME</p> | | | | | | |
| <p>Hour _____ Min. _____</p> | | | | | | |

| | | | |
|---|--------------|-------------------------|--|
| Scope of work: | | COMMENTS: | |
| 1. Alter | 2. Vandalism | | |
| 3. Misuse | 4. Waste | | |
| 5. New work | | JOB INSPECTED BY: _____ | |
| Describe the changed scope of work, if any. | | | |
| WORKMAN'S SIGNATURE | | _____ | |
| SUPERVISOR'S SIGNATURE | | _____ | |
| If the work completed is different from that described, insert an "X" in this block and describe the change in the scope of the work. | | | |

Material cost (dollars): _____

Cause of work: _____

Change in scope of work: _____

Sum of 12 hours

Sum of 12 hours

ATTACHMENT (F)

STOCK CONTROL CARD

STOCKROOM REQUISITION

STOCK CONTROL CARDS

REMARKS—

LOCATION

UNIT

MAX

M.N.

VENDOR

COST ٤ ٦ ٨

[illegible][illegible]

MEMORANDUM FOR THE RECORD

ACCT NO. 2, 20-21

BHA 206

BOSTON HOUSING AUTHORITY

Stockroom Requisition

Project _____ A N^o 51201

Dept. _____ Date _____

ARTICLE REQUESTED (Full description & quantity):

Location and purpose of use:

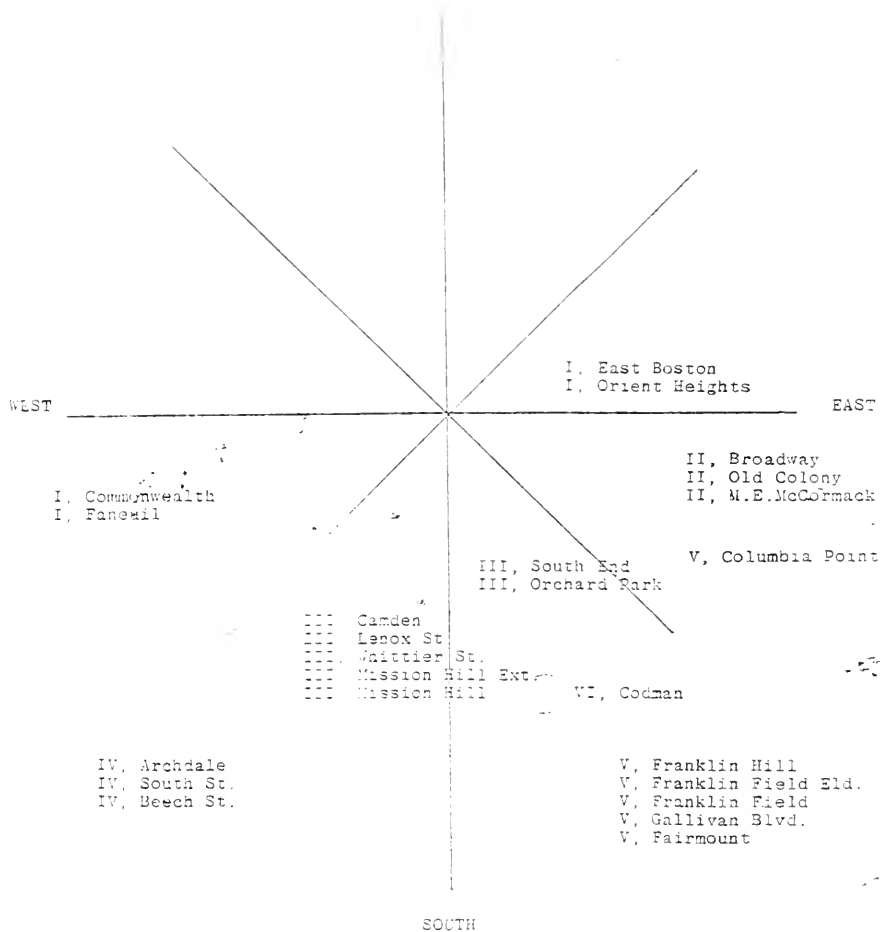
Approved by _____ Requested by _____

Received by _____ Date _____

ATTACHMENT (G)

Example of

GEOGRAPHIC PROXIMITY DIAGRAM



LEGEND

= Level I = 12 developments

= Level II = 11 developments

EXHIBIT 5

ORCHARD PARK TEAM POLICE CONTRACT

AGREEMENT BETWEEN THE
BOSTON HOUSING AUTHORITY
AND
BOSTON POLICE DEPARTMENT

AGREEMENT, entered into this day of June, 1980,
by and between the Boston Housing Authority (hereafter "Authority")
and the Boston Police Department (hereafter "BPD").

WITNESSETH:

WHEREAS, the Authority desires to develop an organized
police patrol at the Orchard Park housing development for the
purpose of maintaining security and safety within the development
and to enhance the living environment of its tenants; and

WHEREAS, the BPD is empowered to contract with the Authority
to provide services in the form of Team Police Patrols (hereafter
"Team Police").

NOW, THEREFORE, in consideration of mutual promises contained
therein, the parties do hereby covenant and agree as follows:

Article I Period of Performance

The term of this AGREEMENT is from June 11, 1980, through
September 8, 1980. There shall be, within the term of this
AGREEMENT, two phases, as follows:

A. Phase 1 Training Phase. The term of this phase shall
be from June 11, 1980, through June 13, 1980.

B. Phase 2 Assessment and Patrol Operations Phase. The term
of this phase shall be from June 17, 1980, through September 8, 1980.

Article II Compensation

As consideration for the BPD's services, the Authority
shall:

A. Pay to the BPD, as full compensation for services

performed under the Training Phase of this AGREEMENT, \$3,853.30.

B. Pay to the BPD, as full compensation for services performed under the Patrol-Operations Phase of this AGREEMENT, \$74,438.28.

C. Reimburse the BPD for funds expended for the purchase of a motor bike in an amount not to exceed \$1,600.00 provided that said vehicle is used solely for patrol purposes under this AGREEMENT and is purchased on or before June 28, 1980. Title for said vehicle shall be held, and costs for maintenance and upkeep of said vehicle sustained, by the BPD.

Article III Scope of Work

A. The BPD will provide police units as described in III.B. and III.C. below to serve as Team Police for the purpose of patrolling the Orchard Park development, maintaining security, order, and safety within the development, and otherwise serving in their capacity as officers of the law with the full force and effect of those powers granted to them by law.

B. During the Training Phase, the BPD shall provide one (1) lieutenant, two (2) sergeants and twelve (12) patrolmen, each of whom shall work six (6) hour shifts per day for the three (3) day period of this phase. During this period, the BPD will provide training personnel and materials as needed.

C. During the Assessment and Patrol Operations Phase, the BPD shall assign two (2) sergeants and twelve patrolmen full time to a unit to be called the Orchard Park Team Police Unit. Members of this

unit shall work, as assigned, shifts between the hours of 7:30 a.m. and 1:00 a.m. The second sergeant is assigned for experimental purposes only to provide supervision during the start-up period of the program.

D. During the first two weeks of patrol operations, members of the team will document, in writing, their assessment of the problems in the project. The team coordinator will then prepare a memorandum to the Police Commissioner, for transmission to the BHA, outlining this assessment and detailing the specific strategies which the team will undertake in the following weeks.

Article IV Staffing Factor

A. The "staffing factor" refers to the number of police of any given rank (lieutenant, sergeant, patrolman) who must be available for duty under this AGREEMENT in order to insure compliance with Articles III.B and III.C. above.

B. The staffing factor for the purposes of the evaluation of this AGREEMENT shall be 2.00, subject to appropriate adjustments after a sixty (60) day review period, including pro-rated retroactive adjustments.

Article V Location of Units

All Team Police assigned under this agreement shall be deployed and shall remain primarily within the Orchard Park development. At least 90% of the dispatch or self-initiated activity as indicated by dispatch records shall be within the Orchard Park Housing Project or within one block of the area contiguous to it. This boundary

shall include both sides of the street forming the one block boundary. If after a sixty (60) day review period the BPD dispatch reports indicate that 10% or more of the dispatch or self-initiated activity is not within the agreed upon area, appropriate pro-rated adjustments shall be made, including pro-rated retroactive adjustments.

Article VI Officer Selection and Approval

All selections and assignments of officers assigned under this AGREEMENT are to be made by the Boston Police Department. Officers so assigned shall remain subject solely to the supervision of the Boston Police Department.

Article VII Amendment

This AGREEMENT shall not be amended without the written consent of the parties hereto.

Article VIII Assignment

The BPD shall not assign, subcontract or in any way transfer any interest in this AGREEMENT without prior written consent of the Authority.

Article IX Assumption of Loss of Liability

A. The BPD shall pay any and all debts for labor and materials which may be contracted for by the BPD, for the rental or purchase of any equipment required for performance by the BPD (except as provided in Article II.C.), and for any other expense incurred on account of services to be performed under this AGREEMENT.

B. The BPD shall assume the defense of and hold the Authority, its officers, agents and employees harmless from, any and all suits and claims against it arising from any act

or omission of the BPD, its officers, agents and employees in any way connected with the performance of this contract.

Article X Remedies of the BPD

If damages are actually sustained by the BPD due to any act or omission for which the Authority is legally responsible, the Authority shall allow the BPD a sum equal to the amount of such damages sustained by the BPD as determined by the Authority or a Court of competent jurisdiction, provided that the BPD shall have delivered to the Authority a detailed written statement of such damages and cause thereof within thirty (30) days of the act or omission by the Authority.

Article XI Remedies of the Authority

A. If the BPD shall provide services in a manner which is not to the satisfaction of the Authority, the Authority may terminate this Agreement immediately thereafter.

Article XII Access to Records

The BPD agrees that the Authority will have reasonable access to sector dispatch records and such other records as pertain to work performed by the BPD under this AGREEMENT.

Article XIII Relationship with the Authority

The BPD is retained solely for the purposes of and to the extent set forth in this AGREEMENT. The BPD's relationship to

the Authority during the term of this contract shall be that of an independent contractor. The BPD shall have no capacity to involve the Authority in any contract nor to incur any liability on the part of the Authority. The BPD's agents or employees shall not be considered as employees of the Authority. The Authority shall not be liable for any personal injury to, or death of the agents of employees of the BPD.

Article XIV Schedule of Payments

The Authority shall reimburse the BPD for the above costs on a monthly basis. The BPD shall bill the Authority for these costs. These payments shall be deposited into a special account to be established specifically for the Orchard Park Team Police project by the City of Boston Auditing Department. The account number shall be 3-33-95-00-0, and should be noted on payments sent to the Auditing Department in care of Mr. Joseph McCormack, Auditing Department, City of Boston.

Article XV Severability of Provisions

If any of this AGREEMENT is held invalid, the remainder of this AGREEMENT shall not be affected thereby; and all other parts of this AGREEMENT shall nevertheless be and remain in full force and effect.

In witness whereof, the BPD has caused this AGREEMENT to be duly executed on behalf of its hand and seals to be hereunto affixed and attended; and thereafter the Authority has caused the same to be duly executed on its behalf, this day of June, 1980.

Boston Police Department

Joseph Jordan, Commissioner
Boston Police Department

Boston Housing Authority

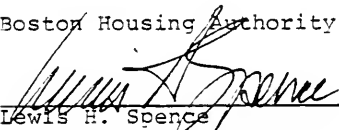

Lewis H. Spence
Receiver for the
Boston Housing Authority

EXHIBIT 6

ORCHARD PARK TEAM POLICE FIRST REPORT

Boston Police

Page 1 of 5Date 07/07/80DISTRICT/UNIT District TwoCC# N/A

To: ~~Mr. Zachary Tumin, Boston Housing Authority~~ *Joseph Tomin B.P.D.*
From: Lieutenant Maurice C. Flaherty, District Two
Subject: Orchard Park Housing Project Team Police Unit
Sir:

On June 17, 1980 at 7:30 A.M. a Team Police Unit was assigned to the Orchard Park Housing Project. The unit, which has Police Department call numbers B-681 & B-682 is comprised of Twelve (12) Patrol Officers and Two (2) Patrol Supervisors. The Boston Housing Authority provided the unit with office facilities at 1124 Harrison Avenue, Apartment #25. The working hours of the six (6) Patrol Officers assigned to the day shift are 7:30 A.M. to 4:00 P.M., four (4) officers assigned and 8:30 A.M. to 5:00 P.M. two (2) officers assigned. The working hours of the six (6) Patrol Officers assigned to the night shift are 5:30 P.M. to 1:00 A.M. The two Patrol Supervisors (Sergeants) are assigned to night duty in separate squads, and have the flexibility of working day tours of duty.

The main two criminal problems within the Orchard Park Housing Project that the unit concentrated at first was the group problem on Zeigler Street and also the one on Adams Street. The Zeigler Street problem was mainly drug related and the individuals usually concerned in this activity were most likely involved in the Breaking and Entering of homes and motor vehicles, street robberies, vandalism and assaults. The Adams Street problem was alcohol and gambling related and the individuals involved in this type of behavior were usually also involved in assaults, vandalism and loitering.

The solution to these problems was through the arrest process. Our activities were made known to Judge Banks (adults) and Judge Houston (Juveniles) of the Roxbury District Court. Seventy (70) plus men and women were arrested at the above locations, under Chapter 272, Sections 53-59 of the Massachusetts General Laws, and a great number of those arrested were also wanted on various warrants. A number of these individuals were released from custody after their identity was made known to us and after they were informed to stop their activity at the above locations. Upon viewing the home addresses of these 70 plus men and women, we found that the majority of them, approximately 80%, did not reside within the Orchard Park Housing Project.

Date 07/07/80DISTRICT/UNIT District TwoCC# N/A

Subject: The Orchard Park Housing Project Team Police Unit

We believe the only reason they were in the Housing Project area was to commit crime, and because of the protection they believed they had from its structural made atmosphere of the project with its identical buildings and doorways and its many vacant apartments. The majority of those arrested do not congregate in the Orchard Park Area since the start of the Team Police Unit. We believe by solving the aforementioned problems we would also have an impact on other related offenses. This belief is based on experience we have had in the other two Team Police Areas on District Two, namely the Bromley-Heath Housing Project and the Mission Hill Housing Project.

The two main themes of Team Policing is Prevention and Accountability. Prevention is used to eliminate problems that create or generate other problems or continuous calls for police service. The following is a list of procedures the Team Police uses to accomplish its goals of Prevention:

1. Identify The Offenders If a person knows that he is known to the Police on sight and he knows that the same police officers are in the same geographical area, such as the Orchard Park Housing Project day in and day out, he will move his activities out of that area.
2. Develop A Rapport With The Juveniles That Reside in a Particular Area It has been proven statistically that a majority of the street crimes and crimes against property, such as vandalism, are committed by youths under the age of 21 years. We believe it is very important to become involved in youth activities, such as sports and field trips in order to become better acquainted with the juveniles and their families. In the past we have found that it is sometimes better to bring a child home to his parents or refer him to a diversion program than it is to arrest him and bring him before the court. Much of this getting acquainted is done on the off duty time of the police officers.
3. Opening The Lines Of Communications Many of the problems within a small community like the Orchard Park Housing Project could be averted if the lines of communication were open between the residents and the police. All the officers in the Team Police Unit are equipped with business cards with three (3) telephone numbers. There is the 911 for emergency situations, 247-4270, the main number for Police District Two, and 247-4369, which is a recording number, residents can use to pass on information or to complain about a specific problem that is not of an emergency nature.

Date 07/07/80

DISTRICT/UNIT District Two

CC# N/A

Subject: The Orchard Park Housing Project Team Police Unit

Lines of Communications (Cont.)

Many people today do not want to become involved in another person(s) problems. There are many reasons for this situation, but through the use of the recording number, we publicize that the person doesn't have to identify himself when he passes on the information on the illegal activity. We tell the resident to just dial the number, and relay the message so we will be better able to police their area properly, with their help. Rumors have in the past been a problem with police activities in a specific area, because of a lack of communication between the police and the residents. The team police officers walking the housing project and attending weekly community meetings help stamp out rumors and explain correctly activities that might be of concern to residents. Attending a weekly meeting with the Tenant Association in the Orchard Park Project will assist the Police and the Tenants. The tenants can pass on specific problems to the police with the police returning with the solution or progress report the following meeting. The Police can also use these meetings to inform the tenants of their activities and request the tenants help in solving specific problems. The tenants are told from the beginning, that the type of policing they receive is dependent on their cooperation. A police unit can only survive with the help and support of the people they service.

4. Ability To Do Follow-Up Investigations

Police work today limits Patrol Officers in the amount of time they are permitted to handle a specific problem. Following up investigations are done by detectives or others assigned to District Two or Headquarters. In Team Policing, the same officers that respond to a problem are able to follow-up the investigation themselves. This in our opinion provides better services to the complainant or victim. The investigation proceeds faster and the complainant or victim receives feedback from the officers and doesn't have to wait for other officers to get involved in the situation. The problem as in most cases, would be prevented from recurring again by the officers in the street, who would be called to handle the situation, if it was to recur in the future.

Date 07/07/80DISTRICT/UNIT District TwoCC# N/A

Subject: The Orchard Park Housing Project Team Police Unit

5. Arrest Process

The use of the Court System is available as a tool by the Team Police Officers in the Housing Project. If an arrest has to be made we try to prevent it from recurring through the use of the probation system. The Team Police Officers keep in close contact with the Probation Officers of the people they arrest. If a violation of probation occurs, the Probation Officer is notified by the officers. This in itself, is a especially useful tool when dealing with juveniles.

The following is a list of procedures the Team Police uses to accomplish its goals of Accountability.

1. Areas Of Responsibility

Each Officer in the Orchard Park Team has been assigned an Area of Responsibility within the housing project. This responsibility means that he personally introduces himself to every tenant within his area, explain the concept of Team Policing and provide the information necessary to the tenant so the tenant can assist us in policing the area. It also means that he is personally responsible for everything within that area and will be evaluated by the sergeant periodically. This allows the supervisors to go to one particular officer when he observes a problem in an area. This is also a tool of prevention, because an officer will not allow a situation to fester before he reacts to the problem. In policing today, Police Officers have a general responsibility for a specific area. No one officer can be held responsible for a problem that might develop. An example of this could be a gang on the corner, or an abandoned motor vehicle in the street. This situation does not exist in Team Policing because of the specific Area of Responsibility for each officer.

Boston Police

Page 5 of 5

Date 07/07/80

DISTRICT/UNIT District Two

CC# N/A

Subject: The Orchard Park Housing Project Team Police Unit

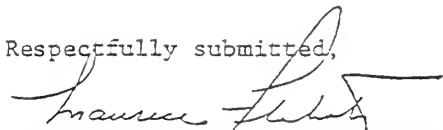
Accountability (Cont.)

2. Attend Community Meetings

The Team Police Officers attend as many community meetings as possible. It allows the residents the opportunity to meet the officers who are responsible for policing their area. It helps develop a good working relationship between the residents and the police. The community meeting also provides an opportunity for the residents and police to pass information on to each other relative to the activities of both within the area.

Enclosed please find F.I.O.'s (Field Interrogation and/or Observation Reports) of individuals arrested from the Orchard Park Housing Project and the activity sheets of the officers assigned to the project.

Respectfully submitted,



Lieutenant Maurice C. Flaherty
Team Police Supervisor, District Two

EXHIBIT 7

WASSERMAN SECURITY MODELS

KEY ISSUES

There are four basic models we are considering for adoption; specific adoption will only occur after detailed planning with the Police Department, tenant's groups, and project managers.

- Team Policing
- Resident Officer Program
- Project Security Patrols
- Tenant Security Patrols

The model selected will be based upon the type of problem requiring attention in the project, the availability of Police Department resources, Tenant desires and expectations, and past history of security efforts in the project.

For the Priority I projects, the models proposed are as follows:

MISSION HILL

Presently has Team Policing coverage
Plan to ~~implement~~ PROJECT SECURITY PATROL

Will provide 1 Investigator

3-4 Uniformed Guards (with hours varying
according to season and time of day)
Some funds held for special problems (such
as police overtime to deal with special
crises (such as drug problems)

6,400 hours of patrol time by guards would
be provided (800 8-hour shifts)

CHARLESTOWN

Presently served by a Team Policing program
Plan to ~~implement~~ PROJECT SECURITY PATROL

Same design and statistics as above project

ORCHARD PARK

Presently has no special police coverage
Plan to implement TEAM POLICING PROGRAM

Will provide for 12 police officers assigned to the project full-time (replaced by overtime)
One police Sergeant also assigned as supervisor

Team to operate between the hours of 7:00 AM and 1:00 AM
Regular police coverage the early morning hours

MISSION HILL EXTENSION

Presently has Team Policing coverage
Plan to implement PROJECT SECURITY PATROL

Same design and statistics as Mission Hill

CATHEDRAL

Presently has little special police coverage except for an occasional walking officer on overtime
Plan to implement RESIDENT OFFICER PROGRAM coupled with PROJECT SECURITY PATROL (without an Investigator)

Resident Officer patrol will provide for a single Boston Police Officer assigned to the project for a year; serve as liaison with police department and as a project resource for developing strategies to deal with problems of drug usage, etc.

Some money will be allocated for use by the Police Department in attacking drug problems which arise.

BROMLEY HEATH

Presently served -in a way- by the Team Policing Program
Plan to implement a TENANT SECURITY PATROL.

Will provide for a patrol of tenant officers, supervisors, and project leader. 4 patrol officers will be employed full-time.

Security Models
Boston Housing Authority

RESIDENT OFFICER PROGRAM

Objectives: Provide a police liaison officer to a high crime project to identify problems areas

Provide a linkage between the project management and the Police Department in such a project

Provide a limited police presence in the project on a regular basis, with that presence linked to specific project problems

The "Resident Officer" model is a limited cost operation, wherein a single Boston Police Officer is assigned to a problem housing project to assess the situation, provide guidance in the assignment of security guards employed by the Boston Housing Authority, and provide a linkage between the BHA and the Boston Police Department, especially in serving as an advocate for the assignment of specialist officers for limited periods of time to handle specific problems (such as drug dealing).

Key Characteristics: Provides for a single police officer who is held accountable for police activities in the project

Officer selected has knowledge of the area, is a volunteer, and wants to do this type of work

Officer maintains liaison regularly with tenants and project management, as well as with the Police Department.

Costs: The resident officer is a full-time Boston Police Officer, replaced by provision of overtime costs to the department to cover his/her regular assignment. These costs are as follows:

.53 officers per day working
8.00 per day worked
7 days a week coverage
\$14.70 average overtime replacement cost
\$272.69 weekly cost to the BHA for the officer

The resident officer concept can be used in conjunction with several of the other models. For example, the use of a "principal investi-

RESIDENT OFFICER: 2

gator" and several security guards can form a team effort providing both visibility, police response capability, and detailed follow-up potential.

For this model to be effective, the police officer selected must be sensitive to the intergroup relations problems in housing projects, be respected by the District commander (so he/she can obtain additional resources, as required), and be able to self-initiate proactive activities.

Consideration in this model should be given to providing a small amount of "un-committed" overtime funds for use by the officer in obtaining special assistance for complex cases, such as a detailed drug investigation.

Security Models
Boston Housing Authority

PROJECT SECURITY PATROL

- Objectives: Provide the capability to follow-up on non-police service matters, such as noise, minor disturbances, and evictions
- Provide a uniformed presence during hours when police presence is limited
- Provide a follow-up capability for minor incidents which come to the attention of the police and which they cannot follow up

The Project Security Patrol is made up of an "Investigator" (a name which ought to be changed) and several security guards contracted by the tenant's council. There are several options for the assignment of the security guards; in general, however, they would be assigned during hours of high "incivility" incidence when visibility would achieve the maximum effect and police resources are most limited or committed to other activities.

The "Investigator" would work jointly with the Project Manager and a representative of the local police district (or, preferably with the Police RESIDENT OFFICER, if one exists to follow-up on continuing problems (such as regular noise complaints, youth disturbances, harassment complaints, and other matters the police capability to provide follow-up on is limited. The security guards would be assigned by the investigator based upon his/her analysis of problems and with the advice of the tenant's council, Project Manager, and police department.

Options for this model include employing the security guards from a pool of carefully selected residents.

- Key Characteristics: Uniformed security presence provided during times of high incidence of problems
- Supervision of the effort is provided by a higher-paid skilled security employee
- Investigative follow-up is available to resolve major or continuing localized non-criminal problems

Costs: The "Investigator" would be paid in the range of \$15,000 to \$17,000. The security officers would be paid in the range of \$4.00

PROJECT SECURITY PATROL

to \$4.25 per hour. Administrative costs would add about \$2.00 per hour to the cost.

There are several options for this program which would impact the number of hours received for patrol purposes. If a private security firm is used, their overhead would be higher. A viable option would be the formation of a non-profit security group to provide the services, reducing the overhead.

| <u>Security Company</u> | | <u>Non-Profit</u> |
|-------------------------|----------|-------------------|
| 3.25 hr. | Pay Rate | 4.25 hr. |
| 2.00 | Overhead | 2.00 |
| 1.00 | Profit | — |

Thus, higher quality employees could be secured, and supervision would be provided by the Project "Investigator".

Security Models
Boston Housing Authority

TEAM POLICING

Objectives: Provide a highly visible police presence in a limited area

Develop relationships with tenants and BHA project personnel

Undertake specific strategies toward impacting key problems in a project (i.e. drug usage, vandalism, breaking and entering, and incivilities to residents)..

The team policing operation is a dedicated unit of Boston Police officers assigned to a housing project. They assume total responsibility for all reactive and proactive police activities, including responding to calls for service, building relationships with tenants, identifying key crime and incivility problems, and undertaking strategies to eliminate target problems.

Key Characteristics: Staffed by full-time Boston Police Officers, familiar with the area

Supervised by a single police Sergeant, who is accountable for the team's performance

Direct linkage between the project team and other police resources

Uncommitted time (non-call response time) can be spent on Authority priorities, rather than on Police Department's or administration's

Costs: The team policing program is normally staffed with 12 police officers and one sergeant. Using police manning strength figures, it takes 1.92 police officers to fill a single position 8 hours a day, seven days a week (providing for sick time, injured leave, vacations, and days off). Thus the following costs can be estimated:

6.32 officers per day working

8.00 hours per day worked by each

7 days a week covered

\$14.70 average overtime replacement cost

\$5,203.00 weekly cost to the BHA for police officers

For the Police Sergeant, the figures are as follows:

TEAM POLICING: 2

.53 officers per day working
8.00 hours per day worked
7 days a week covered
\$18.17 average overtime replacement cost
\$563.00 weekly cost to the BHA for Sergeants

Thus, the total weekly cost to the BHA (without consideration of cost reduction for service already being performed) is \$5,766.00.

It is important to understand that the team policing programs operating throughout the city only operate daily from 7:00 AM through 1:00 AM; during the early morning hours, policing remains the responsibility of the police District.

For this model to be effective, it is important that the 12 officers and their sergeant selected undergo a training program to orient them to the objectives and operations of the BHA, the priorities of the present administration, and characteristics of the project, and to meet some of the tenants. Such a training program should take no more than three days.

This model is proposed for the Orchard Park project as a means to being a secure environment to a project in the middle of a high-crime area. The team policing model is appropriate here because high police visibility is required to establish control of the project environment. And the impact of the proposed effort is increased, since there will be major spinoffs to the surrounding non-project area which is directly impacted by project generated criminal activity.

A limited amount of funds requested may be used to provide for overtime for officers ~~attending~~ the training program (three days) and for the purchase of a few motor scooters to provide the officers with greater mobility.

Security Models
Boston Housing Authority

TENANT PATROL

Objectives: Provide a uniformed, trained security presence in a project on a regular basis

Have the patrol force run and managed by the project residents

Based upon the highly successful Bromley Heath Tenant Patrol, this model provides for a mini-security force for a particular project, providing coverage over a broad period of time. All members of this type of patrol are normally project residents.

Options include the employment of Building Captains, residents having specific responsibilities for a particular building, for which they would receive a stipend each month.

These programs are the most difficult to organize successfully, since they require recruitment, training, and deployment of a substantial number of new employees.

Key Characteristics: The most community (project) based of all the security programs

Have potential for conflict with the police department unless regular coordination is carried out

Have the potential for the greatest return, in terms of tenant acceptance.

Costs: The project director (or tenant patrol leader) is paid in the range of \$15,000 - 16,000. Patrol officers are paid between \$9,000 and \$10,000. (There is a need to stabilize rates between projects, such as Bromley Heath and Franklin Field). If building captains are used, they are provided a stipend of about \$1,000 per year.

It is worth considering the employment of a resident officer with each of these programs, so that coordination of the effort with the police department will be enhanced, unless the program is operating in an area within which a Team Policing program is operating.

EXHIBIT 8

FIRST DRAFT TENANT SERVICES PLAN



INTEROFFICE COMMUNICATION

July 23, 1980

TO: Distribution

AT:

FROM: Orlando Isaza, Special Assistant for Program Development and Evaluation

AT:

SUBJECT: DRAFT REORGANIZATION PLAN, TENANT SERVICES DEPARTMENT

07/23/80

Attached, for your review and comment, please find a copy of a draft plan for reorganizing the Tenant Services Department.

This plan will be discussed at our meeting on July 29, 1980.

Orlando Isaza
Special Assistant for Program
Development and Evaluation

cc: D. Gilmore
M. Mullan
M. Kelly
M. Thomson
J. Murphy
F. Cully
D. Kelleher
J. Cochrane

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- II - Over-All Goals and Objectives of Tenant Services Department
- III - General Assumptions and Guiding Principles
- IV - Organizational Chart
- V - Glossary
- VI - Activities and Tasks
 - Resident Service Unit Functions
 - Community Service Unit Functions
 - Department-wide Functions

BACKGROUND:

The present legal status of the Boston Housing Authority bears witness to the lamentable conditions of the physical and social fabric of Boston's public housing. In an unprecedented decision, the judicial system, through a Receivership Order, has intervened to mandate and facilitate the provision of "safe, sanitary and decent housing" to low-income people found eligible for publicly subsidized housing in the City of Boston.

Though the Order clearly emphasizes the need to focus the Receiver's attention on the physical plant of Boston's public housing it also, in its introduction, acknowledges the "shocking--social disintegration" in our developments. The Order further, in its outline of the Receiver's responsibilities, directs him "to improve...employee relations and tenant relations" and "to improve the relationship of the BHA's developments to the neighborhoods in which they are located". It is clear that the severe social disintegration, alienation and helplessness that prevail in our developments must be simultaneously addressed. The complementary nature of the physical and social approaches to public housing, implicit in the Order, must be formally acknowledged by the Boston Housing Authority. Only a comprehensive approach, involving improvements in the physical structure and the social fabric of the developments, will contain the decay and sustain the gains in Boston's Public Housing.

A major obstacle to comprehensiveness of approach, however, is the lack of coherent Federal, State and Municipal policies and the concomitant fragmentation of responsibilities in areas as fundamental as security, sanitation and safety, but also in social services for public housing residents. In 1977, the Executive Office of Communities and Development, in an attempt to address this need, issued a policy statement on tenant services which, while restating the longstanding tradition of denial of operational funds to deliver social services to tenants, sought to define "tenant services" and to diminish the fragmentation of responsibility by stressing the need to integrate "resident services", a component of "tenant services", into the regular operations of the LHA's. In regards to the second component, "Community Services", EOCD called for aggressive efforts to obtain funding from private and public sources other than housing agencies to ensure service promotion, facilitation and delivery.

EOCD, following HUD's own definitions, describes the two components of tenant services:

"Resident Services" are those services provided by the PHA directly or through residents organizations, which enable the individuals to meet their obligations as residents and as members of the community, and which make it possible to establish and maintain good management-resident relations. Examples are pre-occupancy orientations, short term counseling, information and referral assistance, and resident education in such areas as home care, maintenance, and security.

"Community Services" are those services provided by community-based agencies (public and private) other than the PHA. Such services may be delivered through programs specially designed for public housing residents or for some wider group of eligible clients which includes public housing residents. Examples include health services, income assistance, recreation, job training and placement, and consumer services.

II. Over-All Goals and Objectives of the Tenant Services Department:

In compliance with EOCB's policy statement, the BHA recognizes its responsibility to guarantee the provision of "Resident Services" and to facilitate the delivery of "Community Services" to our residents. The present Plan for reorganization of the Tenant Services Department incorporates and operationalizes our responsibility as a public housing authority in this area by creating Resident Service and Community Service Units to pursue the following goals and objectives.

1. Resident Services Unit:

Assist BHA's Management, Maintenance, Occupancy and Security in improving their ability to guarantee a safe, sanitary and comfortable shelter to all residents of the Authority through:

- a. Increased knowledge and responsiveness regarding reciprocal responsibilities of Management and residents.
- b. Improvements in inter-departmental communication and inter-action.
- c. Resource identification and mobilization at local level.
- d. Increased coordination, cooperation and service delivery capability among organized groups of residents, Management personnel and local providers.
- e. Development and Administration of special projects for special needs population, such as the Elderly, the Handicapped and residents with alcohol related problems.
- f. Provision of crisis intervention/I&R Services.

2. Community Services Unit:

Promote and facilitate the delivery of quality health/human services to all residents of our developments through:

- a. Increased level of awareness and responsiveness among advocacy, planning, policy making, funding and service delivery agencies to the health and human services needs of BHA residents.
- b. Selection, monitoring and evaluation of agencies and programs serving BHA developments.
- c. Provision of information and technical assistance to agencies serving BHA developments on program development and potential funding.

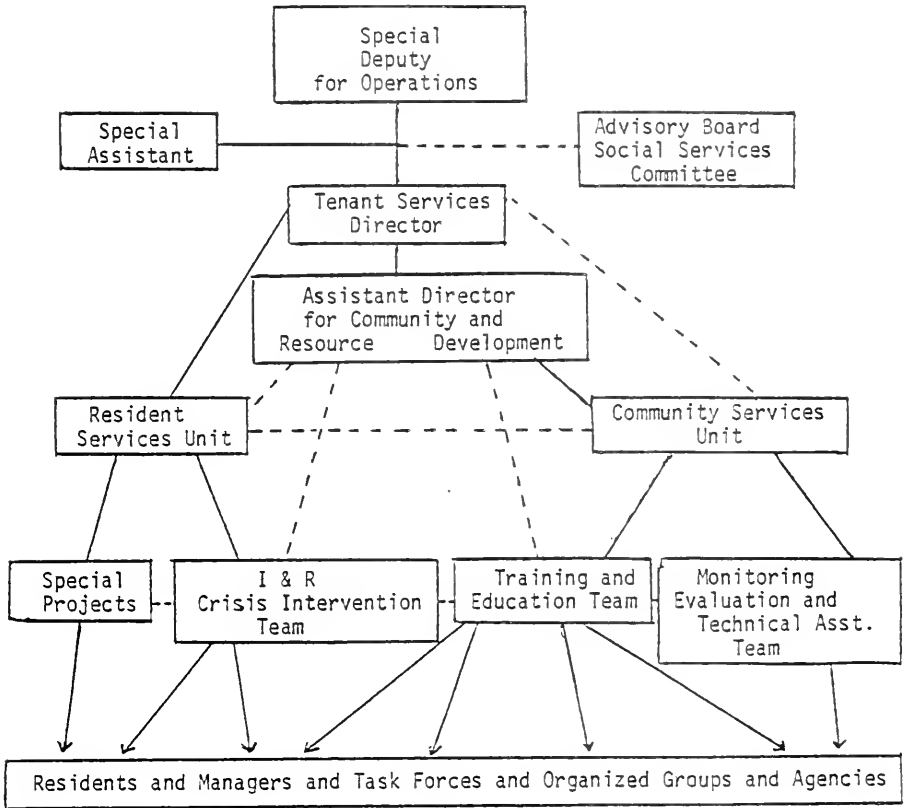
III. General Assumptions and Guiding Principles:

A central factor to the success of the Tenant Services Department is our ability to promote and enhance, both within the Authority and in our developments a spirit of community--A community embracing residents, BHA staff, agencies, organized groups, and surrounding neighborhoods, all working together for the common good and the well-being of our tenants.

Improvements in the quality of life in our developments can better be attained through a combined and complementary effort in improving the physical plant as well as the level of community interaction and the quality of human relationships. Towards that major goal, the proposed plan focuses on:

- a. Activities that respond to priority needs of the residents (safety, security, sanitation, food and nutrition, employment, and recreation).
- b. Activities that promote the residents creativity and general well-being.
- c. Activities that increase communication among tenants.
- d. Activities that increase communication between management and residents.
- e. Activities that, generally, promote cooperative and collaborative connections and linkages between and among people, agencies, and institutions.
- f. Activities that seek to define the appropriate levels of personal, social, and institutional responsibility for the solution of personal and community problems.
- g. Activities that promote and enhance self-help and mutual-help skills among residents.
- h. Activities that systematically seek to increase information and knowledge on residents' needs and resources.

ORGANIZATIONAL CHART



Solid Line = Accountability relationships
Dotted Line = Collaborative relationships

GLOSSARY

| | |
|--------|---|
| AD-CRD | Assistant Director for Community and Resource Development |
| BU | Boston University |
| CSU | Community Services Unit |
| C&E | Consultation and Education |
| DFA | Department of Financial Assistance |
| DSS | Department of Social Services |
| DD | District Director |
| EOCD | Executive Office of Communities and Development |
| FSAGB | Family Service Association of Greater Boston |
| HHS | Health and Human Services |
| HUD | Housing and Urban Development |
| LHA | Local Housing Authority |
| MASC | Mass. Human Services Coalition |
| OPD | Office of Planning and Development |
| OPS | Office of Public Services |
| PHA | Public Housing Authority |
| RSU | Resident Services Unit |
| TPC | Tenant Policy Council |
| TF | Task Force |
| UCPC | United Community Planning Corporation |

RESIDENT SERVICES UNIT FUNCTIONS

FUNCTION: Assist other BIA Departments in improving their ability to guarantee a safe, sanitary, and comfortable shelter for all residents

RESPONSIBLE PERSON(S): Director of Tenant Services/Resident Services Unit Supervisor

| ACTIVITIES | TASKS | SIGNIFICANT BIA ACTIONS | OTHER SUPPORTS | TIME TABLE |
|--|--|---|--|---|
| 1. Enhance awareness among tenants and management of their reciprocal responsibilities as determined by signed leases regulations, & statutes. | a. Draft relevant documents for distribution to tenants & management. | <u>Primary:</u> Dir. of Man. (Designee) <u>Secondary:</u> T.S. Dir., (R.S.U.), (C.S.U.), Sp. Asst. | IPC EOD HUD Pilot Program Planning Legal | Specific timetable for all activities and tasks on this page will be established by the Director of Field Management by 9/30 1980 |
| | b. Design and utilize methods and mechanisms for dissemination of info Examples: orientation pamphlets, pre-occupancy sessions, workshops on home care, maintenance, security, etc. | <u>Primary:</u> Dir. of Man. <u>Secondary:</u> T.S. Dir., (R.S.U.), (C.S.U.), Sp. Asst. | Public relations, IPC, Security, Maintenance Development-based agencies | |
| | c. Conduct Tenant information program. | <u>Primary:</u> Man./I.F. <u>Secondary:</u> R.S.U. | | |
| 2. Enhance ability of both management & resident to assume their respective responsibilities. | a. Review & refine procedures & forms to request & facilitate compliance with established mutual responsibilities. | <u>Primary:</u> Dir. of Man. <u>Secondary:</u> Legal, Adm., Sp. Asst. | IPC, DD's | |
| | b. Provide info & training to managers & Task Forces on forms & procedures. | <u>Primary:</u> Dir. of Man. <u>Secondary:</u> DD's, C.S.U., Sp. Asst. | IPC | |

| ACTIVITIES | TASKS | SIGNIFICANT BHA ACTORS | OTHER SUPPORTS | TIMETABLE |
|--|--|---|---|---|
| 3. Increase inter-departmental communication & coordination of activities. | a. Define points and nature of interface between T.S. & Occupancy, Management, Maintenance, Security relevant to the effective delivery of their services to present & potential tenants | <u>Primary:</u> Mgt. & T.S. Dir. <u>Secondary:</u> Sp. Asst. | Deputy for Operations Legal Special Assistant | Initiate process 8/31 1980 Complete task 10/30 1980 |
| | b. Define specific role & responsibility of tenant services in: - Screening process - Eligibility evaluation - Suitability determination - Evaluation process - Transfers - Grievances | <u>Primary:</u> Dir. of Occ. <u>Secondary:</u> Dir. of T.S. | | |
| | c. Define specific role & responsibility of tenant services in: - Minority placement | <u>Primary:</u> Sp. Deputy for Operations & Dir. of Occupancy <u>Secondary:</u> Dir. of T.S. | | on-going now to be determined by Sp. Dep. for Op. & Dir. of Occ. |
| | d. Define specific role & responsibility of tenant services in: - Inspections - Rent collections - Work Orders - Evictions | <u>Primary:</u> Dir. of Management <u>Secondary:</u> Dir. of T.S. | | January 1, 1981 |

| ACTIVITIES | TASKS | SIGNIFICANT BUA ACTIONS | OTHER SUPPORTS | TIMETABLE |
|---|--|---|--|--|
| 4. Identify & mobilize existing neighborhood resources to address specific needs of the local development. | SEE COMMUNITY SERVICE ACTIVITY | UNIT SECTION #5 | | |
| 5. Increase ability of Mgt. personnel & organized groups of residents to respond adequately to tenants' social needs. | <p>a. Design course on the helping relationships community organization.</p> <p>b. Determine format, content, & duration of sessions.</p> <p>c. Conduct course.</p> <p>d. Conduct informal evaluation.</p> | <p>Primary: Sp. Asst., Dir. of T.S., (R.S.U.), (C.S.U.), Dir. of Mgt.</p> <p>Secondary: (R.S.U.), (C.S.U.), Dir. of Mgt.</p> <p>Primary: Sp. Asst.</p> <p>Secondary: Asst. Dir. C.S.U., R.S.U.</p> <p>Primary: Dir. of T.S.</p> | <p>BU DD's TPC FSAdb</p> <p>BU/FSAdb</p> <p>UCPC</p> | <p>Initiate process 10/1 1980 complete by 10/30 1980</p> <p>Initiate 11/1 1980 Completion to be determined</p> <p>Concurrent with course</p> |

| ACTIVITIES | TASKS | SIGNIFICANT BIA ACTORS | OTHER SUPPORTS | TIMETABLE |
|--|---|---|-----------------------------------|-------------------|
| b. Promote & facilitate the development of Inter-provider councils in selected developments, aimed at sharing knowledge & skills, providing mutual support & improving service coordination. | a. Identify individual providers, by devt., & elicit their participation. | <u>Primary:</u> (R.S.U.) <u>Secondary:</u> C.S.U., Manager, Asst. Dir. | 100's T.F. BU | 11/1 - 11/30 1980 |
| | b. Determine specific developments where sessions could be convened on a pilot basis. | <u>Primary:</u> Asst. Dir., R.S.U. <u>Secondary:</u> C.S.U., Manager | Special Assistant Dir. of T.S. | 12/1 - 12/31 |
| | c. Provide staff assistance in session facilitation. | <u>Primary:</u> Asst. Dir., R.S.U. <u>Secondary:</u> (C.S.U.), Manager | C & L FSAdb | On-going |
| | | | | |

| ACTIVITIES | TASKS | SIGNIFICANT BIA ACTORS | OTHER SUPPORTS | TIMETABLE |
|---|---|---|--------------------------------------|--------------------|
| 7. Provide direct services in the form of short-term counseling in crisis situations where no other source of service is available. | a. Formalize crisis prevention and response plan designed to increase residents' self-help & resource utilization capabilities. b. Conduct daily activities: 1. Crisis intervention 2. Tracking of chronic and potentially volatile situations 3. Supportive response in BIA emergencies 4. Inf., ref., and service provision verification | <u>Primary:</u> Dir. of T.S., R.S.U. <u>Secondary:</u> Sp. Asst., C.S.U. | Special Assistant | 9/30/80 |
| | | <u>Primary:</u> R.S.U. <u>Secondary:</u> Dir. of T.S. | Management Security Outside Agencies | On-going currently |

| ACTIVITIES | TASKS | SIGNIFICANT BIA ACTORS | OTHER SUPPORTS | TIMETABLE |
|---|--|--|-------------------|-------------------------------|
| 8. Administer specialized and/or BIA contracted programs that presently provide direct services to unique client population whose needs cannot currently be met by outside service providers. | a. Conduct daily activities: 1. Elderly Alcoholic Program 2. FSAGB services to elderly residents 3. Handicapped Services 4. Substance Abuse Program. | <u>Primary:</u> Program Supervisors and Coordinators <u>Secondary:</u> R.S.U. Sup., Dir. of TS. | C.S.U. Management | On-going currently |
| b. Present recommendations on organizational placement of: Handicapped Services Substance Abuse | | <u>Primary:</u> Sp. Asst., Dir. of T.S. <u>Secondary:</u> Handicapped Services staff, Substance Abuse coordinator | Special Deputy | Initiate 8/8 complete 8/15 |

| ACTIVITIES | TASKS | SIGNIFICANT BHA ACTORS | OTHER SUPPORTS | TIMETABLE |
|--|---|--|----------------------------------|-----------|
| 9. Provide consultation and technical assistance as requested. | a. Participate in training and education teams of C.S. Unit and BHA. | <u>Primary:</u> C.S.U. <u>Secondary:</u> R.S.U. | | |
| | b. Provide consultation and technical assistance to management and outside agencies on request. | <u>Primary:</u> C.S.U. <u>Secondary:</u> R.S.U. | | |
| | c. Provide assistance with screening and evaluations on appropriate cases at the request of Dept. of Occupancy 1. applicants 2. transfers 3. M.P.O. applicants 4. manager determined rejections | <u>Primary:</u> R.S.U. <u>Secondary:</u> Dir. of F.S., C.S.U. | Occupancy Management Legal | |

| ACTIVITIES | TASKS | SIGNIFICANT BHA ACTORS | OTHER SUPPORTS | TIMETABLE |
|--------------------------------|---|---|---|-------------|
| 10. Serve as Ethical Advocate. | a. Ensure that the human rights and dignity of individuals and groups are protected in the daily operations of BHA. | <u>Primary:</u> R.S.U. <u>Secondary:</u> Dir. of T.S., C.S.U. | Special Deputy Special Assistant Managements All other departments | On-going |
| | b. Ensure that the human rights and dignity of individuals and groups are provided for in BHA policy making. | <u>Primary:</u> Dir. of T.S., Sp. Asst. <u>Secondary:</u> R.S.U., C.S.U. | Special Deputy | On-going |
| | c. Define specific formal activities, processes, and procedures for individual advocacy and client group advocacy. | <u>Primary:</u> Dir. of T.S., Sp. Asst. <u>Secondary:</u> R.S.U., C.S.U. | Special Deputy | 9/1 - 10/30 |
| | | | | |

COMMUNITY SERVICES UNIT FUNCTIONS

COMMUNITY SERVICES UNIT

C.S.U. 1

FUNCTION: Promote and facilitate the delivery of quality health/human services to all residents of our developments.

RESPONSIBLE PERSON(S): Director of Tenant Services, Assistant Director, Community Services Supervisor

| ACTIVITIES | TASKS | SIGNIFICANT BIA ACTORS | OTHER SUPPORTS | TIME TABLE |
|--|--|---|--|---|
| 1. Development and systematic dissemination of data on human service needs & resources available and accessible to BIA residents on a city-wide basis. | a. collect, update and consolidate existent data. | <u>Primary:</u> Asst. Dir. <u>Secondary:</u> Sp. Asst., R.S.U. Sup. C.S.U. Sup. | TPC, UCPC, ABCD, Coalition for Basic Human Right, QIWA | Initiate process by August 15 Resource Report completed by Sept., 1980 |
| | b. Identification of priority needs. | <u>Primary:</u> Asst. Dir., C.S.U. Sup. <u>Secondary:</u> Planning, R.S.U. Sup. | UCPC TPC BU | 9/1 - 12/31 1980 |
| | c. Identification of existent & potential resources to respond to defined priority needs. | <u>Primary:</u> Asst. Dir., Sp. Asst. <u>Secondary:</u> Planning, C.S.U., R.S.U. | BU UCPC | 8/15 - 12/31 1980 |
| | d. Develop tools, methods & procedures for systematic & periodic assessment of health & human service needs among residents. | <u>Primary:</u> Planning <u>Secondary:</u> Asst. Dir, Mgt, Occupancy, C.S.U., R.S.U. | UCPC BU TPC | 12/1 - 3/31 Dec 1980 - March 1981 |
| | e. Develop tools & methods for the development & updating of resource inventories for distribution to each development. | <u>Primary:</u> Planning <u>Secondary:</u> C.S.U., R.S.U. | Managers Providers BU | 2/1 - 3/31 Feb - Mar 1981 |

| ACTIVITIES | TASKS | SIGNIFICANT BHA ACTORS | OTHER SUPPORTS | TIME TABLE |
|---|---|---|---|--|
| 2. Develop systematic evaluation program for services in developments. | a. Identify performance indicators, including client satisfaction measures. | <u>Primary:</u> Sp. Asst. T.S. Dir. <u>Secondary:</u> C.S.U. Sup., UCPC | Planning BU UCPC TPC | 9/1 - 10/31 1980 |
| | b. Develop criteria & procedures for evaluation of Tenant Services program. | <u>Primary:</u> Asst. Dir., Sp. Asst., (C.S.U) <u>Secondary:</u> Planning | | 10/1 - 11/31 1980 |
| | c. Conduct annual program evaluation and lease review. | <u>Primary:</u> Asst. Dir., (C.S.U.), IF, Managers <u>Secondary:</u> Legal | | Lease Review by Legal 9/1 - 10/31 1980 Program Review Lease Negotiations 11/1 - on going |
| 3. Achieve a higher level of recognition & funding for the provision of necessary human services to public housing tenants. | a. Identify specific actors & strategies to increase knowledge of & responsiveness to tenant needs among planning, policy making, service delivery and funding agencies. | <u>Primary:</u> Sp. Asst., Asst. Dir., Planning <u>Secondary:</u> Tenant Services Director or designee | UCPC BU MWSC- Task Force | 2/1 - 4/30 1981 |
| | b. Elicit cooperation from appropriate major actors in targeting services to public housing residents & in increasing the capability of BHA to facilitate the delivery of services. | <u>Primary:</u> Receiver, Sp. Asst. <u>Secondary:</u> Asst. Dir., T.S. Dir. | HHD, HHHS, EUCD, OHO, OPS, DSS, DFA, Elderly Affairs, Handicapped, Div. of Alcoholism, Permanent Charities, United Way, Hyams Trust. | on going |

| ACTIVITIES | TASKS | SIGNIFICANT BIA ACTIONS | OTHER SUPPORTS | TIMELINE |
|---|--|---|---------------------------------|-------------------------|
| | c. Develop proposals & seek funding for special projects. | <u>Primary:</u> Asst. Dir. <u>Secondary:</u> T.S. Dir., Planning | UCPC BU Special Assistant | 4/1 start on going 1981 |
| 4. Facilitate and monitor delivery of services at local developments. | a. Finalize & promulgate policies and procedures regarding allocation of space in BIA developments to social service agencies and programs. | <u>Primary:</u> I. S. Dir., Mgt. Dir. <u>Secondary:</u> Sp. Asst., C.S.U. | Legal TFC | 9/1 - 11/30 1980 |
| | b. Develop recording and reporting forms and procedures. | <u>Primary:</u> Asst. Dir., Sp. Asst. <u>Secondary:</u> Planning, (C.S.U.) | | 10/1 - 11/30 1980 |
| | c. Provide technical assistance to agencies & organized groups in BIA developments in: C.U., Needs assessment, Program evaluation, Proposal development, Proposal Writing, Fund Raising, and Staff Training. | <u>Primary:</u> Asst. Dir., C.S.U. Sup. <u>Secondary:</u> Sp. Asst., J.F. C.S.U. Unit Staff R.S.U. Unit Staff | C & U's BU | In process now |

| ACTIVITIES | TASKS | SIGNIFICANT BIA ACTORS | OTHER SUPPORTS | TIMETABLE |
|---|---|--|---|---|
| 5. Identify & mobilize existing neighborhood resources to address specific needs of the local development | a. Collect, catalogue & distribute information about resources available & accessible to tenants. | <u>Primary:</u> Asst. Dir., Mgt. <u>Secondary:</u> (R.S.U.), Mgt., (DO's), T.P.C., R.S.U. staff. Planning | Task Force Mandated Boards Little City Halls Inter-Agency Councils, etc. | 8/15 & on going |
| | b. Inform local agencies & their respective boards (Social Service Mental Health, Help for Children, Financial Assistance, Elderly, etc.) regarding needs of tenants. | <u>Primary:</u> Mgt. & Task Force, Asst. Dir. <u>Secondary:</u> (R.S.U.), (C.S.U.), Planning. | Local Media, Public Relations Local private funding sources | Annually pro-active 1st effort to be completed 3/31 on-going - on request |
| | c. Promote & facilitate projects & activities such as gardens, thrift shops, food coops, recreational programs & others consistent with department policies. | <u>Primary:</u> Mgt. & Task Force <u>Secondary:</u> (R.S.U.), (C.S.U.), Planning. | Local Media, Public Relations, Local Advisory & Planning Boards Local funding sources | on-going |
| | d. Promote participation in Inter-Agency councils & other local neighborhood Planning & Advocacy Boards by Tenants and Management. | <u>Primary:</u> Dir. of Mgt., Dir. of T.S. <u>Secondary:</u> (R.S.U.), (C.S.U.) | Asst. Director Special Deputy | Simultaneous with rewrite of Management Job descriptions & planning of Management training program. on-going |

D E P A R T M E N T - W I D E F U N C T I O N S

FUNCTION: Enlist and enlist volunteer support and student placements.

RESPONSIBLE PERSON(S): Special Assistant and Director of Tenant Services

| ACTIVITIES | TASKS | SIGNIFICANT BIA ACTORS | OTHER SUPPORTS | TIME TABLE |
|---|--|--|---|-----------------------|
| 1. Enlist and enlist volunteer support and participation for department. | a. Define appropriate role & qualification for volunteer participation. | <u>Primary:</u> Sp. Asst., Dir. of T.S., R.S.U. Sup., C.S.U. Sup. | Media UCPC Mass. Assoc. for OA YMCA Hospitals Educational Institutions | Initiate 9/1 on-going |
| | b. Define appropriate supervisors & supports. | <u>Primary:</u> Sp. Asst., Dir. of T.S., R.S.U. Sup., C.S.U. Sup. | | Initiate 9/1 on-going |
| | c. Identify sources of volunteers. | <u>Primary:</u> Sp. Asst., Dir. of T.S. <u>Secondary:</u> Personnel | | Initiate 9/1 on-going |
| | d. Recruit, screen & assign volunteers. | <u>Primary:</u> Sp. Asst., Dir. of T.S., Kay Gibbs | | Initiate 9/1 on-going |
| 2. Explore the feasibility/desirability of development of Authority-wide volunteer program. | a. Determine agenda and convene meeting of appropriate BIA staff. | <u>Primary:</u> Sp. Dep. for Operations, Sp. Asst., Dir. of T.S. <u>Secondary:</u> Dept. heads, Personnel | UCPC Public Relations Office | open |
| | b. Define roles & functions for student placement that will enhance department capability & student educational goals. | <u>Primary:</u> Sp. Asst., Dir. of T.S. <u>Secondary:</u> R.S.U. Sup., C.S.U. Sup. | Educational & training Institutions | In progress |
| 3. Enlist and enlist student placements. | a. Identify & establish working relationship with appropriate educational & training institutions. | <u>Primary:</u> Sp. Asst., Dir. of T.S. <u>Secondary:</u> R.S.U. Sup., C.S.U. Sup. | | In progress |

FUNCTION:

RESPONSIBLE PERSON(S):

| ACTIVITIES | TASKS | SIGNIFICANT BHA ACTORS | OTHER SUPPORTS | TIME TABLE |
|------------|-------------------------------|--|----------------|-------------|
| | C. Screen and assign students | Primary: Dir. of T.S., R.S.U. Sup., C.S.U. Sup. | | In progress |

FUNCTION:

RESPONSIBLE PERSON(S):

| ACTIVITIES | TASKS | SIGNIFICANT BODILY ACTORS | OTHER SUPPORTS | TIME FRAME |
|------------|-------------------------------|--|----------------|-------------|
| | C. Screen and assign students | Primary: Dir. of T.S., R.S.H. Sup., C.S.H. Sup. | | In progress |

FUNCTION: Department staff training and development.

RESPONSIBLE PERSON(S): Special Assistant, Director of Tenant Services, and Assistant Director

| ACTIVITIES | TASKS | SIGNIFICANT RHA ACTIONS | OTHER SUPPORTS | TIME TABLE |
|---|---|---|--|---------------------------|
| 1. Develop plan for general staff training. | a. Collect data to assess specific needs of staff. | <u>Primary:</u> Sp. Asst., Dir. of T.S. <u>Secondary:</u> R.S.U. Sup., C.S.U. Sup. | DSS resource inventory | 9/1 complete 9/30 |
| | b. Evaluate training needs of staff & department & prioritize same. | <u>Primary:</u> Sp. Asst., Dir. of T.S. <u>Secondary:</u> Asst. Dir. | FSAGB C&E RU DMU DSS | 10/1 complete 10/30 |
| | c. Develop and implement appropriate training programs. | <u>Primary:</u> Sp. Asst., Dir. of T.S. <u>Secondary:</u> Asst. Dir. | | Initiate 11/1 on-going |
| 2. Individual staff development. | a. Assess specific needs & goals in individual staff. | <u>Primary:</u> Dir. of T.S. <u>Secondary:</u> C.S.U. Sup., R.S.U. Sup. | Special Assistant Personnel Special Deputy for Operations Education & Training Institutions | on-going |
| | b. Develop career growth plan. | | | |
| | c. Implement/facilitate | | | |
| 3. Evaluate staff performance. | a. Develop department specific performance indicators. | <u>Primary:</u> Sp. Asst., Dir. of T.S. <u>Secondary:</u> R.S.U. Sup., C.S.U. Sup. | Personnel FSAGB | 1/1 - 3/31 |
| | b. Design evaluation process. | | | |
| | c. Conduct evaluation annually. | <u>Primary:</u> Appropriate Supervisory personnel. | | 1/1 - 2/28 |

FUNCTION: Department staff training and development (continued)
RESPONSIBLE PERSON(S):

| ACTIVITIES | TASKS | SIGNIFICANT BIA ACTORS | OTHER SUPPORTS | TIME TABLE |
|---|--|---|----------------|--------------|
| 1. Develop and implement training program to facilitate department re-organization. | a. Develop training program plan and calendar. | <u>Primary:</u> Sp. Asst., Dir. of T.S. <u>Secondary:</u> R.S.U. Sup., C.S.U. Sup. | | 9/1 - 9/30 |
| | b. Conduct training program. | <u>Primary:</u> Sp. Asst., Dir. of T.S. <u>Secondary:</u> R.S.U. Sup., C.S.U. Sup. | | 10/1 - 12/31 |

EXHIBIT 9

VACANCY SECURING MANUAL

BUILDING SECURING PROCEDURE

BOSTON HOUSING AUTHORITY
July 14, 1980 REVISED

PREFACE

Consolidation as we are all cognizant of is vital to the preservation of the Authority's existing family housing development. Further, we are all cognizant that only prompt judicious action will serve to prevent the ever increasing loss of the Authority's family housing developments by deterring vandals and/or thieves.

In the past the vandals and/or thieves have moved swiftly and subsequently the Authority was always left in the position of closing the barn door after the horse was stolen or destroyed.

A sizeable portion of the battle between the Authority and the vandals and/or thieves has been conceded by the Authority when the decision is made to consolidate and secure designated building or buildings. The designated building or buildings are in atrocious condition, lacking responsible tenants, windows and doors.

They have leaking roofs and are the proverbial garbage and debris storage sites. The only deterring factor that prevents the loss of the entire building or buildings is the presence of the few remaining responsible tenants.

With this in mind, it is vital that the securing and consolidation procedures be undertaken simultaneously, that is when the tenant or tenants are moving out; a strategic viable operational plan must be employed.

The above is the basis for the following material.

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NOTE: It is the responsibility of the control person, during and at the completion of the work, to notify all concerned City and State Officials and certain other concerned parties (notify the Insurance Company) of the intent to secure specific buildings.

Keys, distribution of: One complete set of keys will be held at the Development Office, Central Maintenance and Field Management office.

INTRODUCTION

The following are the instruction procedures and cost estimates (in labor time) for the temporary securing of a building or buildings simultaneously with the consolidation program.

These methods are to be employed in a building or buildings that have been designated for securing.

The building or buildings will remain secured until funds are allocated for their rehabilitation and subsequent responsible tenant occupation.

INSPECTION AND SUBSEQUENT ACTION

Inspection and subsequent cleaning and extermination of apartments will be performed by the Authority's personnel.

The procedure is as follows:

- A. The local housing manager will issue a written request to the maintenance supervisor to indicate the building or buildings that he (local housing manager) wishes to have secured.
- B. The maintenance supervisor shall make the necessary inspection of the designated building or buildings to determine and record the following:
 - (1) The quantity and location of all garbage and debris (apartments, hallways, roofs and basements).
 - (2) All repairs required to individual apartments, hallways, roofs and basements.
- C. Having completed his inspection, the maintenance supervisor will then affect the removal of garbage, debris and appliances, (stoves and refrigerators). The appliances shall be cleaned and stored in a designated area on the development.
 - (1) Each plumbing trap, (kitchen sink, lavatory, bathtub and toilet) shall be filled with a fifty percent (50%) solution of anti-freeze (one (1) cup per sink, lavatory, and bathtub and two (2) cups per toilet.)
- D. The maintenance supervisor shall make arrangements to have any condition which he finds as being a hazard to health or for the continuous operation of the building, repaired or replaced before the building is secured.

INSPECTION AND SUBSEQUENT ACTION (continued)

- E. Roof repairs shall be accomplished under a separate Roof Repair Contract. Development Maintenance Supervisor shall notify Central Maintenance of all conditions requiring attention.

- F. The Maintenance Supervisor, after the satisfactory completion of the above items, shall then effect the extermination of the apartments, hallways and basements.

APARTMENT WINDOW AND DOOR SECURING

- A. All first floor windows and any windows above or beside the canopy roof or other projections shall be covered with metal panels toggled to the buildings interior. (see drawing #1)
- B. All other building window covers shall be type CDX (see drawing #2).
- C. All exterior panels, whether wood or metal, shall have a prime coat applied to all surfaces and edges, followed by a finish coat which is compatible with the building color.
- D. All basement windows shall be covered with 14 gauge steel panels (see drawing #3).
- E. All doors, except for one (1) basement door per building shall be covered with 11 gauge steel (1/8" thick) plate welded to the frame (see drawing #5). Welding shall be one (1) inch tack, six (6) inch space etc. NOTE: All field welds and/or damaged painted areas shall be "touched up" after installation.
- F. The basement door which is to be kept in service shall be covered with an 11 gauge steel plate, or if defective, install a new metal door. Provide the door with a lock guard and hinge pins that are tacked welded. (see drawing #4)
- G. All designated penthouse doors shall be covered with an 11 gauge steel plate welded to the frame (see above on welding). This item will only be applicable when a section of a building is to be secured and the remainder of the building is to be left occupied. In the case of a complete building securing, all penthouse doors that are not designated as requiring protective covers shall be put into proper operation or replaced if they are not substantially solid and capable of being latched from the inside. Under no circumstances shall any door(s) in a secured building(s) be left such that it is vulnerable to an attack by vandals and subsequent entry(s).

SECURE ELECTRIC SERVICE

Before any electric service is interrupted, they must be thoroughly examined to ascertain that they DO NOT service other functions in adjacent buildings or are connected to alarms, pumps, security lights, pipe heaters, etc. These active services must be maintained.

- A. Disconnect all building circuits at panel board (tag all disconnected wires indicating their functions and the area or apartment they service).
- B. Rewire all necessary circuits including basement lights and power, corridor/hall lights, outside security lights, power to pumps and heaters, etc.
- C. Transformers (oil and dry) and associated power circuit items (capacitors, etc.) shall be inspected, conditions noted and any required corrective action taken.
- D. Provide and install locks on all panel boards, power panels, etc.

SECURE PLUMBING

Before any plumbing is disconnected and/or shut off, a thorough inspection shall be made to ascertain that the plumbing serves only the building in question.

A. Shut off cold water main at the street (main).

B. Shut off domestic hot water valve.

(1) Cut and cap pipe --- or

(2) Remove valve handle(s)

In the case where valves will not hold or cannot be operated, use item (1) above.

C. Call Boston Gas and have gas shut off at the street main if applicable. Have gas meters removed and gas lines plugged by Boston Gas. Disconnect all gas ranges.

D. Drain all building risers.

E. Drain and disconnect sprinkler lines.

F. Check and clear any roof drains that are clogged.

SECURE HEATING

- A. Isolate the designated building or buildings at their respective zone control valve(s).
- B. Cut off all supply and return risers. All cut off riser stubs shall be capped.
- C. All risers are to be vented to the atmosphere.
- D. Remove all steam trap internals, use compressed air to blow out all lines. The removed steam trap internals shall be placed into a cloth bag and attached to the piping they served.
- E. Open all dirt pockets on all mains and risers and allow them to drain.
- G. Make any repairs that are required to mains that would make them operational to serve other buildings. These include repairs to pumps, mains and returns.

SECURING INDIVIDUAL APARTMENTS

Where designated apartments are to be secured, singly or in small numbers, in an otherwise good building:

- A. The lock on the door shall be removed and a door protector plate installed. (see drawing #6)
- B. All building areas shall be inspected by qualified personnel who shall document all items requiring repair, refurbishing or replacement.
- C. In individual apartment securing, shut off all radiator and convectors at the valves.
- D. All ranges and refrigerators are to be disconnected from source, removed from the premises, cleaned and stored for future use. Storage arrangements shall be made prior to removal.
- E. All apartments are to be treated with pesticides for vermin and baited for rodents.
- F. All plumbing traps (kitchen, toilets, lavatories, bathtubs) shall be filled with a 50% -- 50% solution of anti-freeze and water.
- G. Electric power, to the apartment, shall be disconnected at the nearest breaker or panel box.

SECURING ELEVATORS

The State Elevator Code requires that elevators that are not in use be decommissioned.

- A. Land counter weight on buffer.
- B. Cut hoist ropes above shackles and remove.
- C. Land car on buffers by chain fall method.
- D. Tightly cover controller, governor hoist motor and any other machinery in elevator machine room with polyethylene. Place sufficient amounts of dessicant inside enclosure to prevent any accumulation of moisture.
- E. Open main and remove fuses.
- F. Secure Elevator Machine Room penthouse door.

COST ESTIMATES

To establish cost estimates, some evaluations and assumptions had to be made.

A seven (7) story building at Mission Hill Extension, Mass 2-14 was used as a model for the calculations. From this model, unit prices could be established and their base can be adjusted according to varying development conditions.

For example: A three (3) story building would not need swing staging, but the rental of a platform truck would be required.

Our assumptions were that there would be a Central Crew to prepare plywood for windows and maintain stock and tools. This crew would service three (3) staging crews who would perform the building securing.

We did not take into account the buildings that have security screens installed on the first floor. We also made an assumption that steel paneling for basement windows should be done by a contract welder, who would supply their own truck. The Authority would supply the material.

Also, two (2) estimates for labor were made. One with States rates in the event that the work is done by outside contract. The other is the Authority's rates in the event all personnel are employed by the Authority.

Capitulations of Cost

From the data available and the assumptions made concerning our model selected, we have developed the following cost per apartment.

| <u>ITEM</u> | <u>State Rate</u> | <u>B.H.A. Rate</u> | <u>Material</u> |
|--------------------------------|-------------------|--------------------|-----------------|
| I. Authority Work | \$ 3,562.30 | \$ 3,562.30 | \$ 811.64 |
| II. Securing Windows and Doors | 11,225.40 | 8,035.08 | 12,647.00 |
| III. Plumbing | 1,049.40 | 715.00 | 300.00 |
| IV. Heating | 2,432.70 | 1,634.04 | 100.00 |
| V. Electric | 385.20 | 262.56 | 100.00 |
| VI. Supervisory and Security | 2,288.00 | 1,734.00 | 1,820.00 |
| VII. Elevator (3) | 1,350.00 | 1,350.00 | ----- |
| Sub Totals | \$22,293.00 | \$17,292.98 | \$15,778.64 |
| Plus Materials | + | + | |
| | \$15,778.64 | \$15,778.64 | |
| TOTALS | \$38,071.64 | \$33,071.62 | |
| Cost per apartment -- 84 Units | \$ 453.23 | \$ 393.71 | \$ 100.00 |

NOTE: The following items were not included in the above tabulation:

| | | | |
|--------------------------|-----------|----------|-----------|
| A) Penthouse Doors | \$ 106.00 | \$ 74.56 | \$ 100.00 |
| B) Individual apartments | N/A | 25.26 | 17.00 |

INSPECTION

| <u>CRAFT</u> | <u>HOURS</u> | <u>RATE</u> | <u>AMOUNT</u> |
|------------------------|--------------|-------------|---------------|
| Maintenance Supervisor | 16 | \$10.84 | \$ 174.00 |
| Laborer | 336 | 7.16 | 2,406.00 |
| Extermination | 21 | 7.16 | 150.36 |
| Inspector | 84 | 9.90 | 832.00 |
| TOTALS | | | \$3,562.36 |

MATERIALS AND EQUIPMENT

| | | | |
|------------------------|-----------------------------|----|----------|
| Truck Rental | -- two (2) weeks | \$ | 560.00 |
| Anti Freeze | -- 21 gallons @ \$4.00/gal. | | 84.00 |
| Extermination Material | | | 167.64 |
| TOTALS | | \$ | 811.64 |
| OVERALL TOTALS | | \$ | 4,374.00 |

Securing Apartment Windows and Doors

| LABOR | | | | | |
|---------------|--------------|-------------------|---------------|--------------------|---------------|
| <u>CRAFT</u> | <u>HOURS</u> | <u>STATE RATE</u> | <u>AMOUNT</u> | <u>B.H.A. RATE</u> | <u>AMOUNT</u> |
| Carpenter | 448 | \$ 13.30 | \$ 5,958.40 | \$ 9.32 | \$4,175.36 |
| Laborer | 448 | 9.70 | 4,345.60 | 7.16 | 3,207.68 |
| Spray Painter | 56 | 14.53 | 814.00 | 10.30 | 578.00 |
| TOTALS | | | \$ 11,118.00 | | \$7,961.04 |

MATERIALS

| | | |
|----------------|-------------------------------|-------------|
| Metal Panels | -- 90 Windows @ \$55.00 each | \$ 4,950.00 |
| Plywood Panels | -- 414 Windows @ \$10.50 each | 4,347.00 |
| Staging rental | -- 3 stagings for 10 days | 580.00 |
| Misc. Material | -- | 420.00 |
| TOTAL | | \$10,297.00 |

* Rental fee for one (1) staging for a month is \$580.00

| | | |
|---------------------------------|-----------------------------|-------------|
| Basement Window Panels | -- 43 panels @ \$20.00 each | \$ 860.00 |
| Door panels | -- 8 panels @ \$80.00 each | 640.00 |
| New Security door (1) | | 200.00 |
| Misc. Materials | | 50.00 |
| Contract Welder (Window panels) | -- 2½ day @ \$240.00/day | 600.00 |
| TOTAL | | \$ 2,350.00 |
| OVERALL TOTALS | | 12,647.00 |

PLUMBING

| LABOR | | | | | |
|---------------|--------------|-------------------|---------------|--------------------|---------------|
| <u>CRAFT</u> | <u>HOURS</u> | <u>STATE RATE</u> | <u>AMOUNT</u> | <u>B.H.A. RATE</u> | <u>AMOUNT</u> |
| Plumber | 6 | \$ 15.90 | \$ 95.40 | \$ 10.84 | \$ 64.80 |
| (street main) | | | | | |
| Plumber | 2 | 15.90 | 31.80 | 10.84 | 21.78 |
| (hot water) | | | | | |

| <u>CRAFT</u> | <u>HOURS</u> | <u>LABOR</u> <u>STATE RATE</u> | <u>AMOUNT</u> | <u>B.H.A.RATE</u> | <u>AMOUNT</u> |
|-------------------------|--------------|-----------------------------------|-------------------|-------------------|------------------|
| Plumber (gas work) | 42 | \$ 15.90 | \$ 667.80 | \$ 10.84 | \$ 455.28 |
| Plumber (risers) | 12 | 15.90 | 190.80 | 10.84 | 130.08 |
| Plumber (sprinklers) | 4 | 15.90 | 63.60 | 10.84 | 43.36 |
| TOTALS | | | <u>\$1,049.40</u> | | <u>\$ 715.30</u> |

MATERIALS

| | | | |
|--|-----|-------|-----------|
| Valves and miscellaneous plumbing supplies | --- | TOTAL | \$ 300.00 |
|--|-----|-------|-----------|

ELECTRICAL

| <u>CRAFT</u> | <u>HOURS</u> | <u>LABOR</u> <u>STATE RATE</u> | <u>AMOUNT</u> | <u>B.H.A.RATE</u> | <u>AMOUNT</u> |
|--------------|--------------|-----------------------------------|---------------|-------------------|---------------|
| Electrician | 24 | \$16.05 | \$ 385.20 | \$ 10.94 | \$ 249.60 |
| TOTAL | | | | | |

MATERIALS

| | | | |
|-------------------------------|--|-------|-----------|
| Miscellaneous Electric Supply | | TOTAL | \$ 100.00 |
|-------------------------------|--|-------|-----------|

HEATING

| <u>CRAFT</u> | <u>HOURS</u> | <u>LABOR</u> <u>STATE RATE</u> | <u>AMOUNT</u> | <u>B.H.A.RATE</u> | <u>AMOUNT</u> |
|--------------|--------------|-----------------------------------|---------------|-------------------|---------------|
| Steamfitter | 153 | \$ 15.90 | \$2,432.70 | \$ 10.68 | \$1,634.04 |
| TOTAL | | | | | |

MATERIALS

| | | | |
|-----------------------------------|--|-------|------------------|
| Miscellaneous valves and fittings | | TOTAL | <u>\$ 100.00</u> |
|-----------------------------------|--|-------|------------------|

Individual Apartment Securing

| <u>CRAFT</u> | <u>HOURS</u> | <u>LABOR</u> <u>STATE RATE</u> | <u>AMOUNT</u> | <u>B.H.A.RATE</u> | <u>AMOUNT</u> |
|---------------------------|--------------|-----------------------------------|---------------|-------------------|----------------|
| Carpenter (door plate) | 1 | \$13.30 | \$ 13.30 | \$ 9.32 | \$ 9.32 |
| Inspector | 1/2 | N/A | | 9.90 | 4.95 |
| Laborer (cleaning) | 1 | 9.70 | 9.70 | 7.16 | 7.16 |
| Exterminator | 1/2 | N/A | | 7.16 | 3.83 |
| TOTAL | | | | | <u>\$25.26</u> |

MATERIALS

| | |
|----------------------|-------------|
| Lock protector plate | \$15.00 |
| Pesticides | <u>2.00</u> |
| TOTAL | \$17.00 |
| OVERALL TOTAL | \$42.26 |

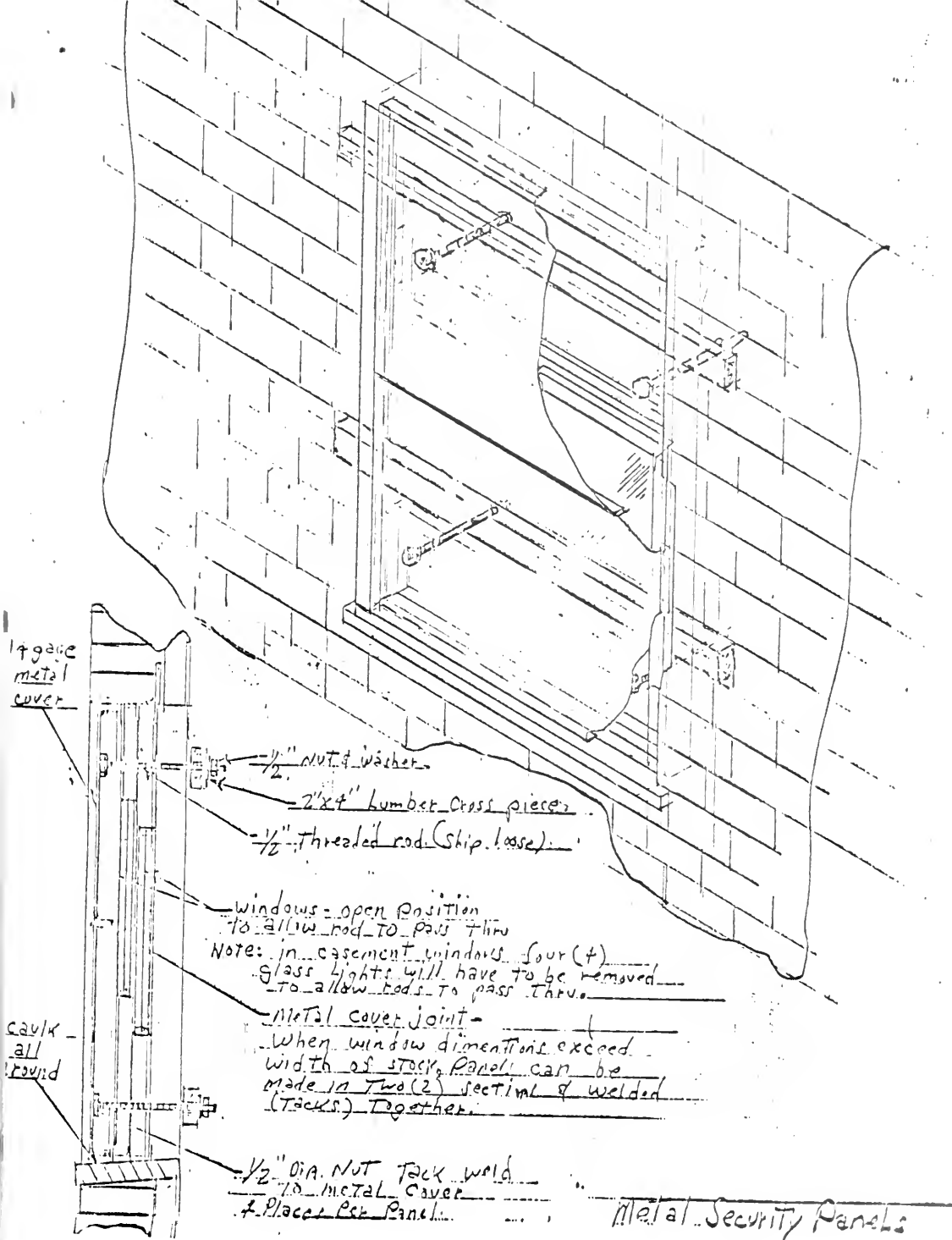
Supervisory and Security

| <u>CRAFT</u> | <u>HOURS</u> | <u>LABOR</u> <u>STATE RATE</u> | <u>AMOUNT</u> | <u>B.H.A.RATE</u> | <u>AMOUNT</u> |
|--------------------------|----------------------|-----------------------------------|---------------|-------------------|---------------|
| Supervisor/ Carpenter | 160 | \$ 14.30 | \$ 2,288.00 | \$10.84 | \$1,734.40 |
| Security Guard | 14 days @ 24 hrs/day | \$130.00/day | | | \$1,820.00 |

GLOSSARY

- ANGLE CLIPS - Sections of metal bent or formed at an angle and used to attach (clip) a panel or plate to a building structure.
- BAIT - Used in extermination to attract rodents. (Usually a food product.)
- CANOPY ROOF - The roof extending out from a typical building over the entry stairs.
- CIRCUITS - A system of conductors (wires) through which an electric current is intended to flow.
- CONDENSATE - Steam that has cooled and turned back to water. This water is usually returned to the boiler for regeneration of steam.
- CONVECTOR - Heating device that converts heat from steam or hot water heating lines to usable building heat. The heat is distributed by "convection" which is a process whereby heat always flows from a hot source to a cold area.
- DIRT POCKET - A piping term for a short extension of pipe installed on a turn or change of direction in the piping. Its purpose being to provide a place for dirt to accumulate where it can be easily removed.
- DOMESTIC HOT WATER - Water that can be used for household purposes (cooking, washing, bathing, etc.)
- DOOR PROTECTOR PLATE - A special device (see attached drawing #1) that is used to secure an apartment door and which can be readily removed with a minimum of damage to the door or frame.
- EXTERMINATION - The process of applying chemicals, pesticides, baits, traps, etc. for the control of vermin (insects) and rodents (rats, mice).
- FUSES - Overcurrent protective device with a circuit opening fusible part that is heated and severed by the passage of overcurrent through it.
- HINGE PINS - The rods or pins that door hinges turn about in opening or closing. These pins are sometimes made so that they can be removed.
- LOCK GUARD BOX - A metal box welded to the door and from which encloses a padlock to prevent it from vandalism.

| | |
|----------------------|--|
| MAINS | - In plumbing and heating, used to define the primary or main building pipe line. |
| PERIMETER | - The boundary of any plane figure (plate or board) or the sum of all its sides. |
| PESTICIDES | - A substance or chemical used to destroy or control weeds, insects, vermin. |
| PANEL BOARD | - Electric device where individual building or apartment circuits connect. Panel boards usually contain fuses and/or shutoff switches. |
| RADIATOR | - A heating distributing device (see convector) which distributes heat by direct radiation; i.e. heat from a fire, or light from a bulb. |
| RISERS | - Used in plumbing, heating, electric service, sprinkler work, etc. to describe the pipe or lines that go from the basement mains and "rise" to the apartments above. |
| STAGING NAILS | - A special two(2) headed nail that can be readily removed. |
| SWING STAGING | - A lightweight work platform that attaches to the outside of a building at the roof and can be easily raised, lowered or moved from location-to-location, or building-to-building, by means of the attaching ropes or cables. |
| TACKWELD | - Small welds spaced at intervals along the work. |
| THRESHOLD | - A strip of metal or wood used to seal the gap under doors. |
| TOGGLED | - A device inserted between two (2) surfaces and rotated or expanded to contact both of the surfaces. To toggle is to clamp to another surface. |
| TRAPS | - In plumbing and heating, a "U" shaped device used to trap or stop the flow of gas or vapor when the flow is not required or the flow must be from a definite direction. |
| TYPE G.D.X. PLYSCORE | - A plywood panel product that is usable for exterior applications, lacking somewhat in appearance value, but possessing good strength and waterproof characteristics. |
| UTILITIES | - Gas, water, electric services, etc. |
| VALVES | - In plumbing and heating, devices used to control or shut off the flow of water, steam or gas. |
| ZONE CONTROL VALVE | - In heating, an automatic valve that regulates the amount of heating allowed into the area. |



Nail Thru panel
into wood frame

$\frac{3}{8}$ " plysec
panel

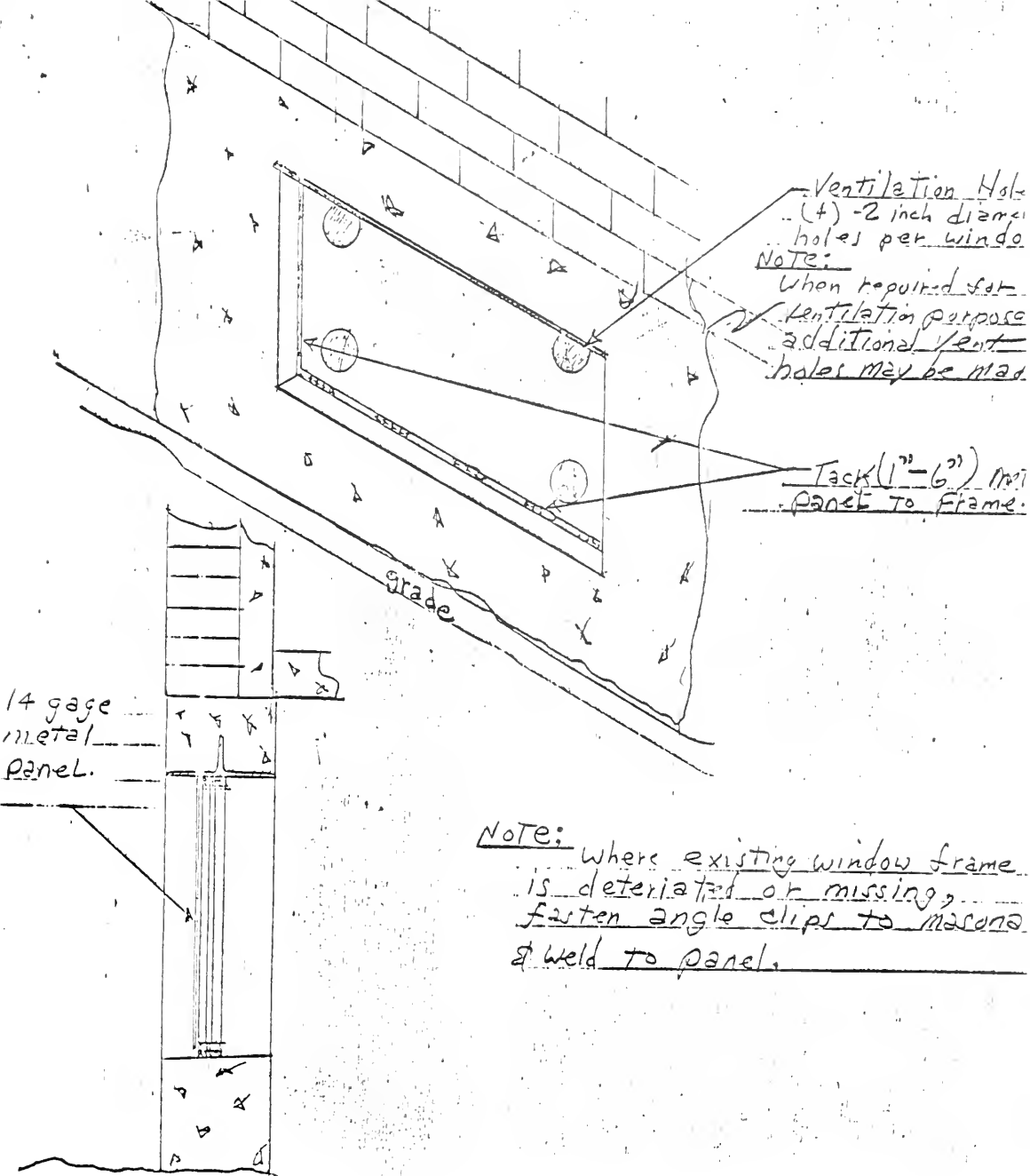
wood
panel

Existing wood window frame.
NOTE: if frame is missing
lag strapping to side of opening
to attach security panel too.

bulk panel
all around
window

Nail panel approx. 8" O.C.

WOOD SECURITY PANELS



Ventilation Holes
 (+) - 2 inch diameter
 holes per window
Note:
 When required for
 ventilation purpose
 additional vent
 holes may be made

Tack (1" - 6") metal
 panel to frame.

1/4 gage
 metal
 panel.

Note: Where existing window frame
 is deteriorated or missing,
 fasten angle clips to masonry
 & weld to panel.

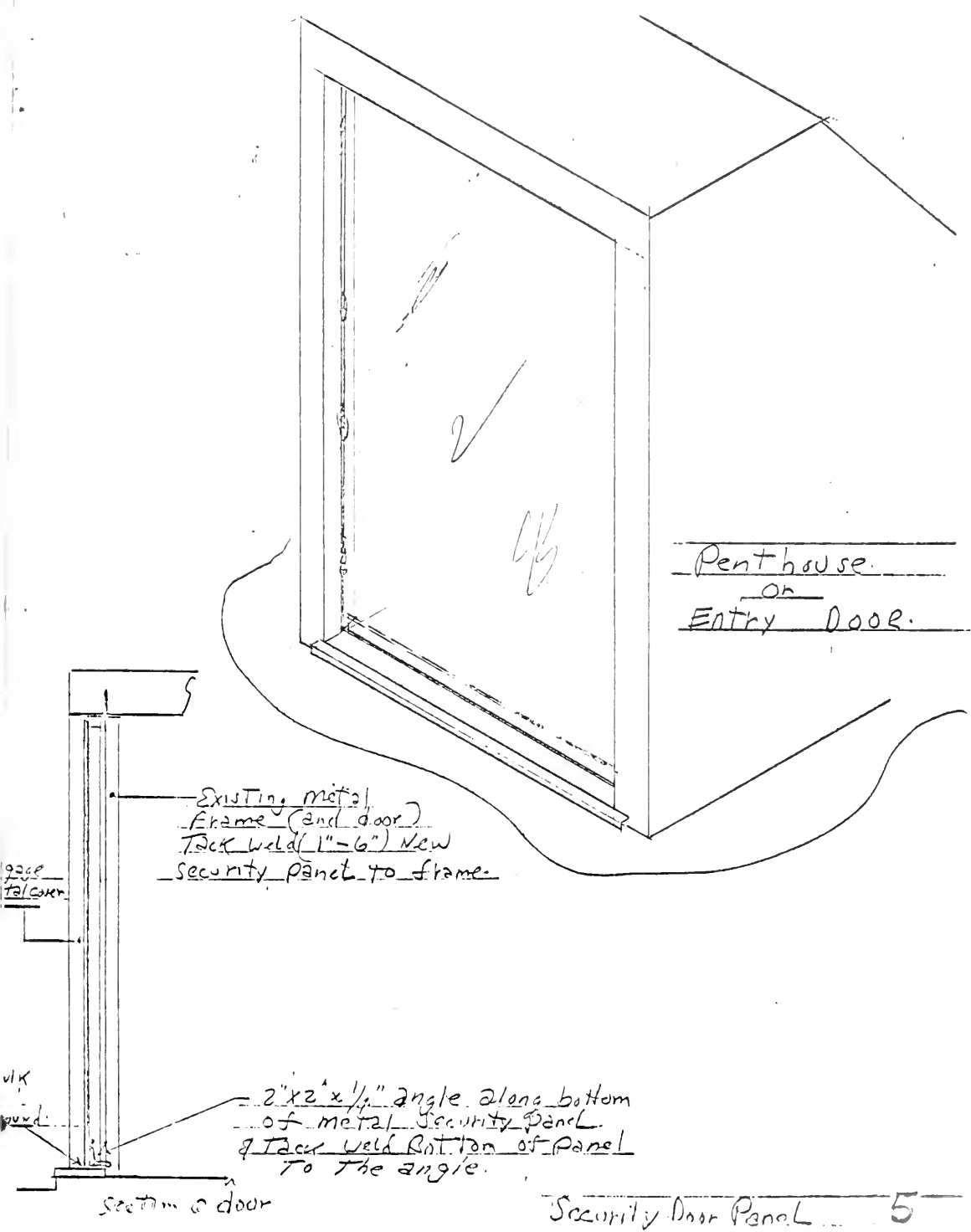
Section @ Window

Tack weld hi
Pins to prove
Removal.

New Lock &
Lock Box, see
Drawing No. 7.

Basement Door:
This door to be metal
w/ metal frame. Furnish &
install new door to replace
any existing wood doors.

Basement (operating) Security Door 4

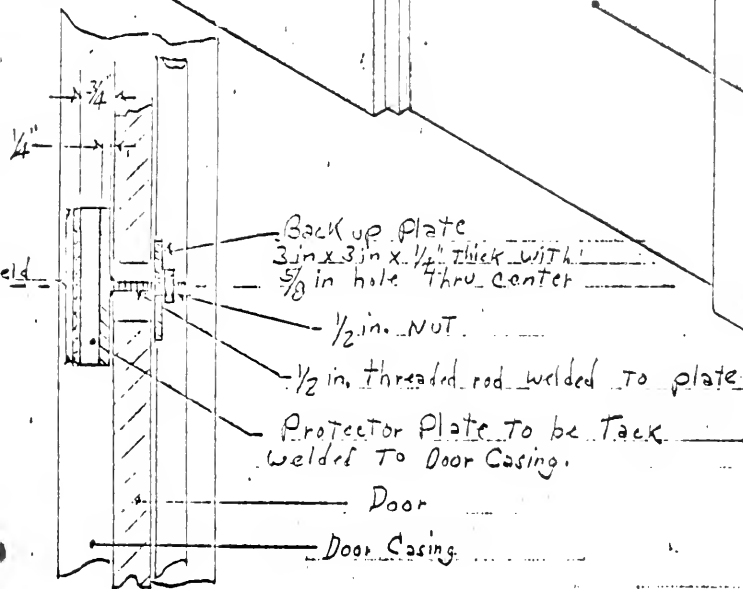


Tack weld protector
plate to door casing

Door Casing

Protector plate.
1/4" thick mild steel
5 in x 5 in w/ 3/4 in. flange,
plate to be bolted thru
the existing lock hole.

Typical Apartment Door



Apartment Door Protector Plate

EXHIBIT 10

SIX MONTH GOALS SCHEDULE

SIX MONTH GOALS AND OBJECTIVES

OPERATIONS

FIELD MANAGEMENT

Identify relocation needs at stabilization developments

Complete work schedule for grounds and vacancy cleanup remainder of Summer and Fall, 1980

Complete inventory of all vacant units

Complete implementation plan for project stores at Pilot developments

Identify and inspect units available at relocation resources at stabilization developments

Final Management Plans for Pilot developments

Complete selection process for all management vacancies and candidates in place

Open project stores at Pilot developments

Achieve 100% occupancy at targeted elderly and family developments (see attached list)

Complete relocation plans at stabilization developments

Complete Management Plans at Orchard Park and Mission Extension

Complete Summer/Fall 1980 grounds and vacancy cleanup (currently underway)

- a. Removal of dead tree limbs, pruning and spraying
- b. Basement clean-out
- c. Vacancy clean-out
- d. Seal vacancies where appropriate
- e. Repair/replace broken fences and benches
- f. Repair/replace exterior lights as needed

Complete Management Plans at Mission Hill and Cathedral

Prepare work schedule and plan for Spring/Summer/Fall 1981 seasonal grounds and exterior maintenance program

Achieve 25% reduction in rent arrearages from
July 1 base (excluding write-offs)

Complete evaluation of project stores at Pilot developments

Project-based maintenance delivery system proposal completed

Complete management training curriculum

CENTRAL MAINTENANCE

Submit rodent extermination proposal to Southwest Corridor
project

Complete water tank insulations at Orchard Park

Reline hot water tank at Franklin Field

Complete steel pan stair replacements at Columbia Point,
Beech St., and Charlestown

Complete Phase I of Orient Heights retaining wall
engineering survey (identification of consulting engineer
and award of contract)

Replace work out steam distribution and return lines and
hot water distribution and return lines at Mission Hill Ext.

116 boilers cleaned, serviced, and prepared for inspection
by insurance company at various developments

Complete repair/replacement of 37 boiler chambers and
boiler settings at various developments

Overhaul 10 burners at Warren Towers, Mission Hill,
Annapolis, Holgate, and Orient Heights

Replace fuel oil pumps at Warren Towers

Install two (2) receiving tanks and repair one (1) tank
at Foley and Ashmont

Insulate four (4) receiving tanks at Franklin Hill,
Foley, and Ashmont

Replace smoke boxes and fans on boilers at Charlestown

Complete snow plan for Winter, 1980-81

Complete specifications for elevator modernization at
Bromley-Heath-Bickford Street

Complete work at elevator machine room at Mission Hill Ext.

Complete specifications for modernization of six (6) elevators at Cathedral

Complete survey of all elevators to determine code compliance

Complete department reorganization plan in conjunction with project based

Complete Phase II of retaining wall engineering survey at Orient Heights (consultants' findings)

Complete specifications for radial chimney boiler room at Orient Heights

Complete renovations of community room at Franklin Hill

Devise vehicle fleet management program

Final draft/publish driver's manual

Draft motor vehicle replacement program

Complete survey and design of steel pan stair replacement at Old Colony

Complete evaluation and restructuring of special equipment and craft pools (emergencies, sewer rodding, oil line repairs, H.I.D. repairs, mail box replacements, incinerator closings, excavations, and floods)

Review and make decisions on renewal of elevator maintenance contracts

Vacancy rehabilitation according to attached schedule

OCCUPANCY

Implement redesigned case tracking system

Announce and implement new waiting list procedures

Develop plan for staggered system of annual waiting list updating based on date of application

Feasibility report of Tenant Status Review Task Force

Implement application update system

Promulgate new grievance procedures

Complete review and update of Tenant Assignment Plan
(including minority preference program, decentralization,
and related functions)

TENANT SERVICES

Complete proposal for department reorganization and
restructuring

Determine status for coming year of three major grant
programs:

Title III - Elderly Alcoholism Program
Title III-B - Crisis Intervention and Prevention Program
NIAAA - Expanded Elderly and Family Alcoholism Program

Complete HUD required report of on-site social services

Develop staff training in preparation for implementation
of department reorganization plan

Implement reorganization plan

Publish information brochure on departmental services
and activities for distribution to tenants and other
agencies

Continue planning and negotiations now underway which
will lead to relationships with:

- a. B.U. School of Social Work which will provide field
work students and a supervisor at six (6) target
developments
- b. Boston Area Health Education Center to provide health
services at selected elderly developments
- c. Department of Mental Health (Solomon Carter Fuller
Mental Health Center) to provide psychiatric services for
elderly tenants

Complete city-wide security system survey by Wasserman Associates

Determine feasibility of seeking Special Police Appointments
for selected security personnel

DEVELOPMENTS TARGETED FOR
VACANCY REHABILITATION BY CENTRAL MAINTENANCE
DURING NEXT SIX MONTHS*

| | |
|--------------------|-----|
| Gallivan Boulevard | 2 |
| Fairmount | 3 |
| Camden Street | 3 |
| Whittier Street | 3 |
| Fanueil | 5 |
| Lenox Street | 42 |
| M.E. McCormack | 7 |
| Old Colony | 51 |
| Franklin Hill | 48 |
| Beech Street | 63 |
| Archdale | 103 |

*Actual work schedule will coincide with extent of waiting list

DEVELOPMENTS TARGETED FOR 100% OCCUPANCY DURING NEXT SIX MONTHS:

Archdale

Franklin Hill

Beech Street

Old Colony

DEVELOPMENTS PREVIOUSLY TARGETED WHERE 100% OCCUPANCY HAS BEEN

ACHIEVED:

Camden Street

Fairmount

Gallivan Boulevard

South Street

Whittier Street

Fanueil

M.E. McCormack

EXHIBIT 11

MEMORANDUM ON ORCHARD PARK SECURITY DOOR KEYS

INTEROFFICE COMMUNICATION

March 21, 1980

TO: Lewis H. Spence
AT: Receiver/Administrator
FROM: David Gilmore
AT: Special Deputy for Operations
SUBJECT: Keys to Security Doors at [Orchard Park]

As you no doubt recall, when we went to visit with the Command Staff at Police District #2 in conjunction with our February 28th site visit to Mission Hill, one of the problems brought to our attention concerned the request by the Police to be given pass keys to the security doors at Orchard Park. We were advised that the request was based upon frequent District #2 experience with inability to respond to calls for police assistance from within buildings because the security doors are locked and tenants could not or would not respond to the request of Police Officers to admit them to the building. Acting Commander Lieutenant John Gifford gave you a letter outlining his concerns.

Following that meeting, I secured the file on this matter and offer you the following brief history.

On December 18, 1979, Orchard Park Manager Carl Willis wrote to General Counsel Joseph Kane requesting his opinion as to the legality of providing duplicate keys to security doors to the District #2 Police. This memorandum was in response to a request to the manager by Lieutenant Gifford of District #2. On January 18, 1980, General Counsel Kane responded to Carl Willis with a memorandum indicating that there were no legal barriers to providing hall door keys to the Police. The memorandum appears to have been based upon an extensive legal opinion written by Virginia M. Allen of the Legal Department.

Under the impression that the keys had already been provided to the Police Department, on January 22, 1980, the Orchard Park Tenant Council requested a meeting with all of the parties involved. That meeting took place on January 30, 1980. It appears from the record that the Police Department had an opportunity to restate the case for keys to the security doors and that the tenants also had an ample opportunity to discuss their concerns. Perhaps its

March 21, 1980

is a fault of the written record, but beyond the claim that the issuance of keys to the Police would defeat the purpose of the security door program and the "don't duplicate" rule imposed on the issuance of keys, there is no real indication of the reason for tenant opposition to the Police Department's request. On February 8th, however, Mrs. Harris sent a letter to Mr. Kane advising of the decision of the Task Force to oppose the duplication of security door keys for the District #2 Police. The letter does not specify the reasons for this decision.

Based upon a conversation between Kay Gibbs and Cynthia Harris on the subject of the keys, I decided to ask the parties to come together for one more attempt at joint resolution before I made my recommendation to you.

At my request, on Thursday, March 13th, a meeting was held at the District #2 office. In attendance were Cynthia Harris and two other representatives of the Task Force, District Director Arthur Fuller, Lieutenant Gifford and myself. Lieutenant Gifford again stated the reasons for his request that keys be provided to the Police. The tenants complained that they had not been advised of General Counsel Kane's legal opinion on the matter. They expressed some additional concern about the process and indicated that they had been given the impression that the keys had already been provided. Their main concern seems to be the matter of control of these keys. They expressed the fear for example, that a Police Officer might respond to a problem at Orchard Park with the key in his pocket only to be called to another section of the district without notice. The tenants said they could envision a situation in which the officer might, in fact, end his shift at some other location in the district with the key in his pocket which might ultimately wind up on his dresser at home. Lieutenant Gifford responded with a description of the process by which the issuance of the keys would be controlled by the Shift Commander.

After a good deal of further discussion, I proposed that we begin a six month trial period during which time security door keys would be provided to the District Police. I further proposed the following conditions for a six month trial period.

1. Keys would be kept in a locked closet in the office of the District Commander and would be issued to uniformed officers only by the Shift Commander.
2. As is the current practice, each officer would fill out Form #25 at the end of the shift at which time all keys in his possession would be returned to the Shift Commander.

3. During the six month trial period, regular periodic meetings would take place between the Community Relations Officer of District #2 and the Tenant Task Force for purposes of periodic evaluation of the trial period.
4. A log would be maintained which would indicate each instance in which the keys to security doors at Orchard Park were issued to a Police Officer. That log would be accessible to the Tenant Task Force.
5. I would designate Arthur Fuller as the person responsible for monitoring the six month experiment.
6. Lieutenant Gifford and I would make ourselves available as needed to meet with the Task Force to address specific problems and concerns as they arose. In addition, we would meet on a planned basis at appropriate times during the six month period.
7. The experiment could be terminated at any time during the six month period that it became evident that it would be appropriate to do so.

There was some general agreement around the table that this was a sound approach. The members of the Task Force asked for some time to take the matter back for discussion at a Task Force Meeting. I indicated that that would certainly be an appropriate thing to do, but that I needed to ask the Task Force members present to agree to do two things:

- a. To agree to report back to me by a specific time. We agreed that the Task Force would meet on or before Thursday, March 20th and report back to me the sense of the meeting.
- b. That the three Task Force representatives present actively undertake to persuade their fellow Task Force members to agree to this experiment. I indicated that although it was ultimately our responsibility to resolve this matter, I would far prefer a cooperative and joint approach which involved the Police, the BHA and the tenants all working together. I had the sense that this point was understood by the Task Force members and that they would approach their meeting with the Task Force in that way. That sense was reinforced by a very brief conversation which took place with Mrs. Harris shortly after the meeting.

Yesterday afternoon, District Director Arthur Fuller reported to me that he had been advised by Mrs. Harris that the meeting of the Task Force had not taken place, would not take place, and that the opposition of the Tenant Task Force to the provision of keys at Orchard Park remains. No further explanation was offered. I have not heard from Mrs. Harris directly on this matter.

In formulating the recommendation I am about to make, I considered the following:

1. Based upon two recent experiences with Lieutenant Gifford and other senior officers at District #2, and feedback which we have gotten from the Tenant Task Force and Manager at Mission Hill, I am persuaded that the Police are genuinely concerned about security at Orchard Park and would approach this experiment professionally with integrity and with the best interests of the tenants at Orchard Park at heart. I do not believe that we should expect abuses of this arrangement.
2. I believe that the conditions of the experiment provide ample safeguards to protect against the possibility of abuse and also provide sufficient opportunity for the tenants to participate fully in an evaluation of the experiment.
3. I am not persuaded that the reasons offered by the tenants for their opposition are justified.
4. I am convinced that to date, the process has allowed more than ample opportunity for all parties to make their case.
5. I am convinced that in providing keys to the Police at District #2, we are in no way violating the rights of the tenants to privacy and that there are apparently no legal barriers to such action.
6. I am convinced that the Police will be better able to provide protection and security at Orchard Park through the provision of keys to the extent that better Police protection will result in some improvement of conditions for tenants at Orchard Park. I believe that we would be acting in the best interests of the tenants by providing the keys.

March 21, 1980

Based on the foregoing and with full recognition of the opposing views held by the Tenant Task Force, I recommend that we provide keys to the security doors at Orchard Park to the District #2 Police for a six month period during which time the previously stated conditions will be in effect. I am of the opinion that we need to resolve this matter without much further delay. As you have requested, I have asked Betty MacInnes to arrange a meeting with the Task Force representatives. At that time, it would be my hope that we could convey to them our final decision.



David Gilmore

amk

EXHIBIT 12

COMPARATIVE CHART OF FIVE MONTH WORK ORDERS

BOSTON HOUSING AUTHORITY
COMPLETED WORK ORDER REPORT
BY DEVELOPMENT AND CRAFT

| <u>CRAFT</u> | <u>9/1/79 - 1/31/80</u> | <u>2/1/80 - 6/30/80</u> | <u># INCREASE</u> | <u>% INCREASE</u> |
|--|-------------------------|-------------------------|-------------------|-------------------|
| Appliance | 994 | 1,112 | 118 | 10.6 |
| Auto Mechanic | 78 | 96 | 18 | 18.7 |
| Carpenter | 3,067 | 4,773 | 1,706 | 35.7 |
| Electrician | 1,647 | 2,000 | 353 | 17.6 |
| Fireman | 4 | 3 | -1 | - |
| Glazier | 1,805 | 2,821 | 1,016 | 36.0 |
| Laborer | 125 | 119 | -6 | - |
| Painter | 273 | 410 | 137 | 33.4 |
| Plasterer | 218 | 294 | 76 | 25.8 |
| Plumber | 3,622 | 5,345 | 1,723 | 32.2 |
| Roofer | 5 | 16 | 11 | 68.7 |
| Site & Structure (CM) | 124 | 214 | 90 | 42.0 |
| Steam Fitter | 826 | 995 | 169 | 17.0 |
| Welder | 69 | 205 | 136 | 66.3 |
| Manager Action (Not Tenant Generated) | 92 | 30 | -62 | - |
| Inspector (Not Tenant Generated) | 1 | 3 | 2 | 66.6 |
| Engineer (Not Tenant Generated) | - | 1 | 1 | 100.0 |
| Not Indicated | <u>1,242</u> | <u>3,238</u> | 1,996 | 61.6 |
| Total All Crafts | 14,192 | 21,675 | | |

WORK PLAN

This Work Plan will develop procedures to address the problems and questions raised in L. H. Spence's memo of March 13, 1980.

Each major issue raised in the memo will be addressed individually from two perspectives: The identification of the problems and what remedial action should be instituted to correct the situation.

1. PURCHASING PROCESS IS INTOLERABLY SLOW.

- a. Identification of problems and a review of a substantial number of purchase requisitions to determine where delays occur. The review should examine the entire process from initiator, supervisory approval, received at Purchasing, possible submission to Budget, Budget approval, vendor quotations, placement of order, receipt of goods.
- b. Interviews with appropriate management staff should be conducted to ascertain their particular problems and to illicit possible suggestions and remedies. Also, at this time, we could explore the question of response to requisitions.

2. PURCHASING DEPARTMENT VIEWS ITSELF AS A CONTROL AND MONITORING FUNCTION RATHER THAN A SERVICE AND SUPPORT FUNCTION .

- a. Identification of problems - Interviews with appropriate management and administration staff to ascertain what position and what functions and roles it currently fulfills and what position, functions and roles it should be fulfilling.
- b. Draft a functional statement which would specify the proper functions and roles of the Purchasing Department and what control functions it should exercise.

3. THE PROPORTION OF CONFIRMING ORDERS SEEMS TO BE EXTRA-ORDINARILY HIGH.

- a. A review and analysis of a substantial number of confirming orders should be made to determine the type and frequency of such orders.
- b. After this analysis is made then an analysis of the petty cash system and other possible alternatives should be made.

4. INVENTORY CONTROL AT CENTRAL STORES.

- a. A detailed analysis of the results of the physical inventory.
 - b. An analysis and a testing of the current inventory system.
 - c. An analysis of inventory control systems both from an accounting viewpoint but also from an actual physical viewpoint.
5. SOME DIFFICULTY IN OBTAINING FROM CENTRAL STORES WHAT IS REQUIRED IN THE FIELD, AND THE QUESTION DEALING WITH A STANDARD CENTRAL STORES CATALOG.
- a. A detailed analysis of Central Stores requisitions.
 - b. An analysis of requisitions which were not filled precisely.
 - c. An analysis of the back-order system.
 - d. An analysis of the use of the standard catalog by the field personnel.



INTEROFFICE COMMUNICATION

July 1, 1980

TO: Elspeth Taylor, Assistant Administrator for Administration
AT:
FROM: Jeff Lines, Administration *JL*
AT:
SUBJECT: Planning and Redevelopment/Construction Management Administration

For the past several days I have been reviewing both the current and proposed staffing patterns for the Divisions of Planning and Redevelopment and Construction Management. In addition, I have also reviewed potential sources of funding for both the current and proposed staffing requirements for these two divisions. The following attached information should serve useful for further discussion and more specifically, for undertaking the development of an overall strategy for funding the Authority's Planning, Redevelopment and Construction Management efforts.

JL/jc

According to the proposed Construction Management and Planning and Redevelopment staffing requirements the Authority is being asked to fund approximately 55 positions at an estimated cost of \$1,262,611 in salary expenses and \$315,653 in employee benefits for a total of \$1,578,264. This \$1,578,264 is based on fiscal year 1981 estimated salaries and employee benefit amounts (excluding workmen's compensation). Of these 55 positions Planning and Redevelopment has requested 21 and Construction Management has requested 29 while 5 positions currently remain unclaimed. Under this proposed staffing arrangement at least 15 positions are expected to be filled with personnel outside of the previous Department of Planning, Development and Modernization. These 15 positions account for approximately \$411,584 in salary and benefit contributions and it is assumed that most of the funds needed to cover these costs are expected to come from the Authority's federal and state modernization programs.

Planning and Redevelopment

In the memo (of 6/16/80) outlining the proposed staffing requirements for Planning and Redevelopment it would appear that most of the new positions consist of no more than re-naming existing (Planning Development and Modernization) positions and that only four of the new positions are being considered as additional. However, a number of the existing positions included in Planning and Redevelopment's proposed table of organization are either vacant or being charged to programs which currently lack sufficient Administrative funds to cover staff salaries and benefits through the next fiscal year (i.e. CDBG I-V and Development). Unless additional modernization or other non-operating funds for administration can be obtained it seems that a number of positions will have to continue to be funded through federal and state operating programs and that perhaps additional positions may have to be added to operating budgets as well. Given the current level of funding provided by both HUD and EOCB, the continued funding of Planning and Redevelopment staff salaries and benefit costs with operating funds as well as that of any additional staff will only serve to hinder the Authority's attempts to support other (i.e. maintenance-related) activities through its federal and state operating programs.

It seems that a financial objective of the Authority should be to obtain enough funds from sources other than its federal and state operating programs to cover the administrative costs of Planning and Redevelopment. Given the current level of administrative funds for non-operating programs such an objective may not be possible to achieve this fiscal year. Nevertheless, before filling vacant positions the Authority should develop a strategy to minimize or even reduce from the outset the level of operating funds required to cover Planning and Redevelopment salaries for even this fiscal year.

Under Planning and Redevelopment's proposed staffing plan approximately \$190,088 in salaries and benefit costs would be charged to federal and state operating programs this fiscal year (if all positions were filled 4/1/80). In addition, this staffing plan would call for charging the CDBG I-V program with approximately \$55,700 and federal and state development programs with \$153,771 in administrative costs (if current salary prorations remain the same). Given that the Authority's federal and state development programs had only approximately \$126,000 in approved unexpended administrative funds remaining as of February 29, 1980 and that most of these funds were contained in development budgets for programs which are essentially inactive, it appears that unless additional administrative funds for development programs are obtained other sources will have to be used (almost immediately). This means that if vacant positions currently charged to development programs are to be filled and existing positions maintained, operating funds will probably be needed to carry these positions through the end of this fiscal year. Thus, the Authority faces a strong possibility of having to increase its operating expenditures for administration to cover the salary and benefit costs of positions previously filled through non-operating programs.

Overall, if all new Planning and Redevelopment positions were to be charged to federal and state modernization programs approximately \$184,536 would be required (see Attachment A) to cover salary expenses for the fiscal year 1981. This amount appears small but when Construction Management positions charged to state and federal modernization programs are added there are not enough funds available from approved modernization programs to cover current and proposed positions for even one year. Therefore, if the objective of funding Planning and Redevelopment positions from non-operating sources is to be obtained more administrative funding for modernization and development programs will be required.

Construction Management

In Construction Management's memo of 6/13/80 it is projected that this division will require 8 additional positions including the already filled position of Assistant Administrator for Construction Management. This memo also outlines the need to fill two positions which are currently vacant as well as the need to upgrade one other existing position (the position of Chief Architect from a grade 12 to 13).

Overall, approximately 21 of the 29 positions requested by Construction Management existed under the previous table of organization for the Department of Planning, Development and Modernization. However, similar to the proposed reorganization scheme presented by Planning and Redevelopment, a number of positions requested by Construction Management are currently being charged to federal and state operating programs. Assuming that all new positions are to be funded with federal and state modernization program administrative funds, there would still be a need to charge approximately \$168,859 to federal and state operating programs in order to cover the salaries and benefit costs of existing staff being charged to these programs (please see attachment B). A principal reason why the amount being charged to federal and state operating programs is so high is that only an amount equal to 15% of salaries is charged to modernization programs for the employee benefits of positions covered with modernization administrative funds. Therefore, the remaining amounts (10% of salaries or 18% when workmen's compensation is added) must be covered through operating budgets.

Under Construction Management's proposed staffing plan approximately \$659,856 in salary and employee benefit expenses would be charged to federal and state modernization programs (if all positions were filled as of 4/1/80) for the fiscal year 1981. This \$659,856 is \$200,000 more than is currently available for administrative funds under approved federal and state conventional modernization programs. When projected full year FY1981 administrative costs for Planning and Redevelopment and unclaimed positions are added the total charges to federal and state modernization programs would be approximately \$867,043. These charges would amount to more than twice what is available for administration under approved federal and state conventional modernization programs. Given that a number of existing and proposed positions are vacant the funding problems currently before us are not as great as it would seem. Nevertheless, additional federal and state modernization administrative funds must be obtained if we are to maintain even our current staffing levels through this fiscal year.

Assessment

In many ways the staffing concerns of the divisions of Planning and Redevelopment and Construction Management are separate, but given the Authority's funding constraints it would seem appropriate to look at their administrative requirements and their impact on the Authority together. Overall, it is estimated that the total salary/benefit costs (if all positions were filled 4/1/80) would be \$1,578,264 when currently unclaimed positions are added (see attachment E). Of the unclaimed positions one is an Accountant charged to CDBG, one is a Senior Accountant charged to federal and state modernization, one is a Contract Coordinator charged to CDBG, one is a Modernization Project Construction Manager II charged to federal and state operating, and one is a Maintenance Inspector charged to federal and state operating. According to Planning and Redevelopment they assumed that the Contract Coordinator, Modernization Project Construction Manager II and Maintenance Inspector would be assigned to Construction Management. However, these positions were not claimed by Construction Management and are being considered separate of the two divisions as well as listed in the attachments as unclaimed (see attachment C).

If salary prorations for Planning and Redevelopment, Construction Management and unclaimed positions remain the same the annual administrative charges would be \$867,043 to federal and state modernization programs, \$418,639 to federal and state operating programs, \$104,799 to CDBG I-V programs, \$153,771 to federal and state development programs and \$34,012 to the pilot programs (see attachment G). Even if the Authority did not fill existing vacant positions and proposed positions it is projected that administrative charges would be \$570,369 to federal and state modernization programs, \$308,212 to federal and state operating programs, \$104,799 to CDBG I-V programs, \$149,799 to federal and state development programs and \$34,012 to the pilot programs. Therefore, given the current level of funding for administration available under modernization, operating and development programs, the Authority must undertake efforts this fiscal year if it is to obtain the necessary funds to cover its administrative expenses for even filled positions.

According to the work program outlined by the Division of Construction Management in the 6/12/80 letter to HUD the Authority anticipates spending approximately \$33,795,060 for capital improvements during the fiscal years 1981 and 1982 under its federal modernization, state modernization, CDBG I-V, HUD Stabilization and EDA programs (see attachment H). Of this \$33,795,060

approximately \$7,508,955 will be expended under the federal conventional modernization program, \$5,244,892 will be expended under the state conventional modernization program, \$4,028,440 under CDBG I-V and \$1,093,983 under EDA (see attachments I and J). The remaining funds to be expended during FY1981 and 1982 consist of \$14,598,285 in HUD Stabilization funds and \$1,370,504 in EOCD Pilot Modernization Program funds. However, unless the administrative request under the HUD Stabilization Program is approved and further administrative funds from EOCD under its pilot and conventional modernization programs are allotted, there will not be enough administrative funds to carry even existing Construction Management and Planning and Redevelopment staff salaries through this fiscal year.

An active effort to solicit administrative funds from EOCD and HUD to cover salary and benefit costs under modernization and development programs needs to be undertaken. Currently, the Authority only has approval for approximately \$440,133 in administrative funds under its 1970 - 1979 federal conventional modernization program and according to its projected rate of expenditure would only be spending approximately 34% of the capital funds available under this program during the fiscal year 1981. Therefore, even if all administrative funds for the 1970 - 1979 federal conventional modernization programs were expended this fiscal year the Authority would be approximately \$314,713 short of covering its salary and benefit costs for even its currently filled positions for the fiscal year 1981. Furthermore, if HUD approves the administrative request under the Stabilization Program Construction Management only expects to spend roughly 17% of this grant during the fiscal year 1981 and therefore should only be entitled to 17% or \$162,430 in administrative funds for this fiscal year (see Attachments I, J and K). If the Authority is to stop its practice of drawing down administrative funds for future modernization work items in order to cover current administrative shortfalls, it must begin negotiations with EOCD and HUD immediately in order to obtain the necessary funds to cover the administration/capital work items remaining from past modernization programs. Otherwise, administrative funding for special programs such as HUD Stabilization, HUD Comprehensive Modernization and EOCD Pilot Modernization will never be used to support these efforts but rather will be used to cover the administrative costs associated with the expenditure of residuals from previous state and federal conventional modernization programs.

Summary and Recommendations

The major non-operating programs administered by the Divisions of Planning and Redevelopment and Construction Management are the federal modernization program, state modernization program, CDBG I-V program, Employment Development Administration Program, state development programs, federal development programs, HUD Urban Initiatives Program, and EOCD Pilot Modernization Program. All of these programs should provide sufficient administrative funding for the Authority to operate them successfully however, most of them do not. Moreover, the Employment Development Program does not provide any administrative funding and the CDBG Program provides very few administrative funds. Since both the EDA and CDBG programs are unique in that they are funded through the City of Boston, approaches which are different from those traditionally followed with HUD and EOCD will probably be required if sufficient administrative funds for these programs are to be obtained.

Both HUD and EOCD will need to provide additional administrative funds for non-operating programs if the proposed staffing plans for Planning and Redevelopment and Construction Management are to be implemented without

increasing operating expenses for administration. Moreover, if the Authority is to fund even its existing staff through the fiscal year 1981 without increasing operating expenses for administration, it will need to obtain additional administrative funds for its modernization and development programs. An active and coordinated effort for obtaining the necessary administrative funds for these programs will need to be undertaken immediately if the Authority expects to receive sufficient funds from either HUD or EOCD before the end of the fiscal year.

The Division of Planning and Redevelopment and Construction Management need to formulate and establish an overall administrative budget which covers their on-going staffing and office expense needs. Such a budget should be based on each individual program budget administered by Planning and Redevelopment or Construction Management. Moreover, the overall administrative budget should be incorporated into the Authority's administrative budgets for operating programs. It appears that the lack of such budgets are the primary reasons for the inadequate level of administrative funds available for Planning and Redevelopment and Construction Management. The development of program-specific budgets and especially an overall (master) budget for these divisions would provide a stronger basis for future staffing and program decisions relating to grant application and administration.

Given the current level of operating funds available to cover administrative costs, it would appear that a basic financial objective of the Authority should be to obtain sufficient administrative funds for non-operating programs to support its Planning and Redevelopment and Construction Management divisions. Such an objective would probably not be realistic for this fiscal year but may be obtainable by late fiscal year 1982 or fiscal year 1983. However, a major effort must be undertaken soon if the Authority is to begin increasing the percentage of capital funds provided by HUD and EOCD for the administration of development and modernization programs. It is recommended that the Authority focus most of its efforts toward increasing its administrative funding of new modernization programs since it is unlikely that the Authority will be undertaking any new development programs in the near future.

In addition to seeking higher levels of administrative funds for new programs, the Authority should consider approaching HUD and EOCD about increasing the administrative funding of existing modernization and development programs. Currently, efforts are underway to negotiate adequate administrative budgets for certain existing federal and in particular, state development programs. Such efforts need to continue but both HUD and EOCD should be approached about providing more administrative funds for existing federal and state modernization programs. For example, EOCD administrative funds for the Authority's conventional modernization programs have been fully expended and it appears that few if any administrative funds for Planning and Redevelopment and Construction Management are being made available under the Pilot Modernization Program. Moreover, HUD should not only be approached about providing more funds under its Stabilization Program but about allowing the Authority to reprogram certain funds made available under 1975 - 1979 conventional modernization programs for administration since few if any funds remain for the administration of the programs. It is recommended that the Authority begin developing a strategy for approaching both HUD and EOCD for additional funds to cover the administrative costs of these programs as soon as possible and that these efforts be coordinated along with other similar budget and finance efforts taking place within the Authority.

Upon reviewing the Division of Construction Management's capital improvement expenditure projections it appears that they anticipate spending approximately \$9,288,986 for fiscal year 1981 and \$19,433,650 for fiscal year 1982 for a total of \$28,722,636 (excluding EDA and CDBG). If one were to assume that the level of funding required for fiscal year 1981 was the amount projected to be charged to federal and state modernization (see attachment E-II) and the amount required for fiscal year 1982 equal to total projected salaries and benefit costs for 1981 (see also attachment E-II) the percentage of projected capital improvement expenditures required to cover Planning and Redevelopment and Construction Management would be an average of 8.5%. This is a rough way of estimating the level of funding required for the administration of federal and state modernization programs, but if we are to decrease the administrative costs of a fully staffed Planning and Redevelopment and Construction Management division charged to operating programs we will need to increase the percentage of modernization grants allocated for administration. This percentage allocation for administration is comparable to other housing authorities such as Cambridge and can be adjusted upward or downward to reflect such factors as the level of in-house labor used to perform Architectural and Engineering services and the inspection of capital works items.

Along with increasing the allocation for the administration of modernization and development programs the Authority should increase its charges for employee benefit contributions from 15% of salaries to an amount which more closely approximates the true cost of benefits paid to employees (funded under federal modernization programs in particular). Although, employee benefits are included in most allocations for administrative costs it is often treated as a separate line item for budget and expense report purposes and should be estimated more accurately even if HUD prefers to fund only 15% of salaries for employee benefits under federal modernization programs.

Finally, the Authority needs to begin assessing the funding required for the administration of special or non-traditional capital improvement programs such as CDBG, EDA, Urban Initiatives and others. This assessment of administrative funding requirements should usually be done at the grant application stage and be based on administrative allocations used in similar HUD and EOCD conventional programs. However, for current programs such as CDBG I-V, EDA and Urban Initiatives efforts should be undertaken to increase the level of administrative funds available to cover program operations. In the case of CDBG I-V and EDA a strategy for soliciting administrative funds for these programs from the City of Boston should be developed. In the case of the Urban Initiatives Program for Columbia Point HUD should be approached regarding a budget revision which will provide for sufficient funds (approximately 8 - 9% of grant) to cover the administration of the program. In addition, it is recommended that the Columbia Point Coordinator be transferred from the federal and state operating budget and have his full salary and benefit costs charged to the HUD Urban Initiatives Program administration line item (since there are sufficient funds to cover this salary).

*for further information please refer to 4/29/80 memo on Planning, Development and Modernization Programs and Budget Status.

Division of Planning and Redevelopment

Schedule of Current and Proposed Positions and Funding Sources

-- The division consists of portions of the previous departments of #352 Modernization, #350 Planning, #354 Assistant Administrator of P.D. & H. Office and #351 Office.

| Dept. | Current Position | Proposed Position | Grade | FY1981 Salary | Fed./ | State Mod. | Fed./State Operating | (2) | (3) CDBG | (4) Development | (5) Office |
|----------|-----------------------|-----------------------------|-------|---------------|------------|------------|----------------------|--------|----------|-----------------|------------|
| 1. 359 | Asst. Administrator | Asst. Administrator | 16 | \$ 37,202 | -- | -- | \$ 34,963 | -- | -- | \$ 2,239 | -- |
| 2. 351 | Development Asst. | Admin. Assistant | 10 | 20,348 | -- | -- | -- | -- | -- | 20,348 | -- |
| 3. CDBG | Chief Planner/Chief | Resource Specialist | 11 | 22,280 | -- | -- | -- | 22,280 | -- | -- | -- |
| 4. 352 | Spec. Asst. for P.D. | Financial Specialist | 12 | 27,210 | 27,210 | -- | -- | -- | 22,280 | -- | -- |
| 5. -- | -- | Health Education Specialist | 12 | 27,210 | 27,210 | -- | -- | -- | -- | -- | -- |
| 6. 350 | Chief Program Coord. | Chief Program Coordinator | 12 | 27,210 | -- | -- | -- | -- | -- | -- | 27,210 |
| 7. 351 | Dir. of Development | Chief of Bureau of Planning | 14 | 27,210 | -- | -- | -- | -- | -- | -- | -- |
| 8. 350 | Dir. of Planning | Chief of Bureau of Planning | 14 | 27,210 | -- | -- | -- | -- | -- | -- | -- |
| 9. 350 | Chief Analyst | Development Coordinator | 11 | 24,690 | -- | -- | 27,989 (7) | -- | -- | 27,989 (d) | -- |
| 10. CDBG | Chief Planner | Development Coordinator | 11 | 24,690 | -- | -- | 27,989 (8) | -- | 22,280 | 1,793 | -- |
| 11. 352 | Planner | Development Coordinator | 11 | 24,690 | 24,690 | -- | -- | -- | -- | -- | -- |
| 12. 350 | Planner | Development Coordinator | 11 | 24,690 | -- | -- | 23,204 | -- | -- | 1,486 | -- |
| 13. 352 | Modernization Planner | Development Coordinator | 11 | 24,690 | -- | -- | -- | -- | -- | -- | -- |
| 14. 351 | Planner | Development Coordinator | 11 | 24,690 | -- | -- | -- | -- | -- | 24,690 | -- |
| 15. 351 | Development Coord. | Development Coordinator | 11 | 22,280 | -- | -- | -- | -- | -- | -- | -- |
| 16. -- | -- | Development Coordinator | 11 | 22,280 | 22,280 (9) | -- | -- | -- | -- | -- | -- |
| 17. -- | -- | Senior Secretary | 5 | 14,589 | -- | -- | 13,711 | -- | -- | -- | -- |
| 18. 359 | Senior Secretary | Senior Secretary | 5 | 14,589 | -- | -- | -- | -- | -- | 14,589 | -- |
| 19. 351 | Secretary | Secretary | 4 | 12,106 | -- | -- | 11,377 | -- | -- | 729 | -- |
| 20. 350 | Secretary | Secretary | 4 | 12,106 | -- | -- | -- | -- | -- | -- | -- |
| 21. -- | -- | Secretary | 4 | 12,106 | 12,106 | -- | -- | -- | -- | -- | -- |

Division of Planning and Redevelopment
Schedule of Current and Proposed Positions and Funding Sources
(continued)

| Description | Federal | State | Fed./State | Operating | CDMG | Development | Other |
|-------------------------------------|---------|---------|------------|-----------|--------|-------------|--------|
| Total Salaries | 491,400 | 100,716 | 119,716 | 0 | 44,560 | 123,017 | 27,210 |
| Employee Benefit Contributions (10) | 121,672 | 23,070 | 34,000 | | 11,140 | 30,754 | 6,802 |
| Grand Total | 613,072 | 123,786 | 150,089 | | 55,700 | 153,771 | 34,012 |

- (1) Salaries charged 80% to federal conventional programs and 20% to state conventional programs.
- (2) Salaries charged to operating programs in accordance with the following operations: Federal Operations - 69.96%; Chapter 200 - 22.61%; Chapter 667 - 99%; Federal Development Programs - 3.25%; State Development Programs - 2.77% and Chapter 667-3A - 42%.
- (3) Currently, these two (planner) positions plus an accountant and Contract Coordinator are being charged to the administrative overhead portion of CDMG. I-V programs however, only \$149,186 remained as of March, 1980.
- (4) Currently, the \$153,771 listed above (if all above positions were filled) and a number of other Central Office salaries and expenses are being charged to federal and state development programs. However, only approximately \$100,000 (or less) appear to remain in administrative overhead for development programs.
- (5) The category of "other" consists of the salary and benefit costs of the Pilot Program Coordinator charged to the FQCD Pilot Modernization Programs.
- (6) It is anticipated that a cost savings of \$2,968 will be achieved by eliminating the Director of Development's position and filling it with a Grade 13. However, as mentioned before the Development Programs currently lack sufficient administrative staff to conduct the day-to-day operations for existing staff.
- (7) It is anticipated that a cost savings of \$2,968 will be achieved by eliminating the Director of Planning's position. However, this position is currently charged to operating and development programs.
- (8) It is proposed that the positions of Assistant Director of Planning and Research Analyst would be eliminated and that the position of Redevelopment Director would be created at a position of Grade 13. The positions are expected to be funded through operating and development programs.
- (9) It is assumed that the positions are expected to be funded through federal and/or state modernization administration funds.
- (10) Employee benefit contributions are estimated at 25% of salaries. Please note that employee benefits for salaries charged to modernization programs are charged 15% to modernization and 10% to operating programs.

- this division consists of positions of the previous departments of #352 Modernization, #350 Planning
#359 Assistant Administrator of P.O. Mail Office and #351 Development

| Dept. | Current Position | Proposed Position | Grade | FY1981 Salary | Fed./State Mod. | Fed./State Operating | Other |
|--------------------------------|---------------------------|--|-------|---------------|-----------------|----------------------|-------|
| -- | -- | Assistant Administrator Construction Mgr. | -- | -- | -- | -- | -- |
| 352 | Director of Modernization | Dirce. of Modernization | 17 | 39,875 | 39,875 | -- | -- |
| 352 | Constr. Superintendent | Constr. Superintendent | 14 | 32,750 | 32,750 | -- | -- |
| 352 | Chief Inspector | Chief Inspector | 14 | 32,750 | 32,750 | -- | -- |
| 352 | Mod. Proj. Constr. Mgr. | Mod. Proj. Constr. Mgr. | 12 | 27,210 | 27,210 | -- | -- |
| 352 | Architect | Architect | 12 | 27,210 | 27,210 | -- | -- |
| 352 | Program Manager | Program Manager | 12 | 27,210 | 27,210 | -- | -- |
| 352 | Mod. Coordinator | Mod. Coordinator | 11 | 24,690 | 24,690 | -- | -- |
| 352 | Mod. Coordinator | Mod. Coordinator | 11 | 24,690 | 24,690 | -- | -- |
| 352 | Senior Draftsman | Senior Draftsman | 9 | 20,592 | 20,592 | -- | -- |
| 352 | Maintenance Inspector | Inspector | 9 | 20,592 | 20,592 | -- | -- |
| 352 | Maintenance Inspector | Inspector | 9 | 20,592 | 20,592 | -- | -- |
| 352 | Mod. Section Aide | Mod. Section Aide | 8 | 17,823 | 17,823 | -- | -- |
| 352 | Secretary | Secretary | 5 | 14,589 | 14,589 | -- | -- |
| 352 | Secretary | Secretary | 4 | 12,106 | 12,106 | -- | -- |
| 352 | Contract Administrator | Contract Administrator | 13 | 29,782 | 29,782 | -- | -- |
| 352 | Contract Coordinator | Contract Coordinator | 7 | 16,351 | 16,351 | -- | -- |
| 359 | Senior Secretary | Senior Secretary | 5 | 14,589 | 14,589 | -- | -- |
| 352 | Chief Architect | Chief Architect | 13 | 28,462 | 28,462 | -- | -- |
| -- | -- | Energy Audit Clerk | 6 | 15,600 | 15,600 | -- | -- |
| -- | -- | Mechanical Engineer | 13 | 28,462 | 28,462 | -- | -- |
| -- | -- | Program Assistant | 8 | 16,121 | 16,121 | -- | -- |
| -- | -- | Specifications Writer | 8 | 16,121 | 16,121 | -- | -- |
| -- | -- | Modernization Coordinator | 8 | 16,121 | 16,121 | -- | -- |
| -- | -- | Field Inspector | 9 | 17,570 | 17,570 | -- | -- |
| -- | -- | Field Inspector | 9 | 17,570 | 17,570 | -- | -- |
| -- | -- | Director of Force Account Crews | 12 | 26,154 | 26,154 | -- | -- |
| TOTAL SALARIES | | | | 662,972 | 573,788 | 89,184 | -- |
| Employee Benefit Contributions | | | | 165,743 | 861,068 | 79,675 | -- |
| Grand Total | | | | 828,715 | 659,856 | 160,859 | -- |

Divisions of Planning and Redevelopment and Construction Management

| Dept | Position | Grade | FY1981 Salary | Fed./State Mod. | Fed./State Operating | DBG | Other |
|--------------------------------|----------------------------|-------|---------------|-----------------|----------------------|--------|-------|
| Public Works | Asst. Dir. of Const. Mgmt. | 11 | 24,690 | -- | 24,690 | -- | -- |
| | Asst. Dir. of Const. Mgmt. | 9 | 20,592 | -- | 20,592 | -- | -- |
| | Asst. Dir. of Const. Mgmt. | 11 | 24,690 | -- | 24,690 | 24,690 | -- |
| | Asst. Dir. of Const. Mgmt. | 9 | 20,592 | 20,592 | -- | -- | -- |
| Total Salaries | | 75 | 14,589 | -- | -- | 14,589 | -- |
| Employee Benefit Contributions | | | 105,153 | 20,592 | 45,282 | 39,279 | -- |
| Total | | | 20,209 | 2,053 | 14,410 | 9,020 | -- |
| Total | | | 131,442 | 22,651 | 59,492 | 49,099 | -- |

0. Positions Funded Under Divisions of Planning and Redevelopment and Construction Management but not Included in List provided by Personnel

| Dept. | Position | Grade | FY 1981 | Salary | Fed./State Mod. | Fed. State Operating | CDBG | Budget |
|-------|--------------------------------|-------|---------|--------|-----------------|----------------------|--------|--------|
| 350 | Planner | 11 | 24,690 | -- | -- | 24,690 | -- | -- |
| 352 | Chief Inspector | 12 | 27,210 | 27,210 | -- | -- | -- | -- |
| 352 | Senior Assistant | 9 | 20,542 | 20,542 | -- | -- | -- | -- |
| 353 | Planner | 11 | 24,690 | -- | -- | -- | 24,690 | 24,690 |
| CDBG | Contract Coordinator | 11 | 24,690 | -- | -- | -- | 24,690 | -- |
| CDBG | Accountant | 5 | 11,589 | -- | -- | -- | 11,589 | -- |
| | | | | | | | | |
| | Total Salaries | | 110,461 | 47,802 | -- | 24,690 | 39,279 | 24,690 |
| | Employee Benefit Contributions | | 34,115 | 7,170 | -- | 10,953 | 9,820 | 6,172 |
| | Grand Total | | 170,576 | 54,972 | -- | 35,643 | 49,099 | 30,862 |

E. Summary of Positions and Funding Sources for Fiscal Year 1981

- Includes list of all current and proposed positions contained in requests for Division of Planning and Development, Division of Construction Finance and Planning and Development.

| I. Division/Status | Salary | Fed./State Mod. | Fed./State Operating | Other | Development | Other |
|----------------------------|-------------------------------------|-----------------|----------------------|-----------|-------------|----------|
| Planning and Redevelopment | \$49,316 | \$166,149 | \$109,411 | \$34,560 | \$123,017 | \$27,210 |
| Construction Management | 662,522 | 225,000 | 49,101 | -- | -- | -- |
| Unclaimed Positions | 105,151 | 20,592 | 45,202 | 39,279 | -- | -- |
| Total | \$1,262,611 | \$554,846 | \$273,699 | \$83,839 | \$123,017 | \$27,210 |
| II. Division/Status | Employee Benefit Contribution | Fed./State Mod. | Fed./State Operating | Other | Development | Other |
| Planning and Redevelopment | \$ 123,621 | \$ 24,070 | \$ 50,855 | \$11,140 | \$ 30,754 | \$ 6,802 |
| Construction Management | 165,743 | 86,068 | 79,675 | -- | -- | -- |
| Unclaimed Positions | 26,209 | 2,059 | 14,410 | 9,820 | -- | -- |
| Total | 315,662 | 112,197 | 144,940 | 20,960 | 30,754 | 6,802 |
| Grand Total (I+II) | \$1,578,269 | \$667,043 | \$418,639 | \$104,799 | \$153,771 | \$34,012 |

Divisions of Planning and Redevelopment and Construction Management
Schedule of Vacant Positions

P.

| Dept. | Position | Grade | FY1981 Salary | Fed./State Mod. | Fed./State Operating | CDBG | Development | Other |
|--------------------------------|------------------------------|-------|------------------|------------------|----------------------|------|----------------|-------|
| 352 | Chief Inspector | 12 | \$27,210 | \$27,210 | -- | -- | -- | -- |
| -- | Energy Audit Clerk | 6 | 17,400 | 15,600 | -- | -- | -- | -- |
| -- | Redevelopment Director | 13 | 27,902 | 27,902 | 27,909 | -- | 1,793 | -- |
| -- | Redevelopment Director | 13 | 27,902 | 27,902 | 27,909 | -- | 1,793 | -- |
| -- | Research and Marketing Spec. | 12 | 27,210 | 27,210 | -- | -- | -- | -- |
| -- | Redevelopment Coordinator | 11 | 22,280 | 22,280 | -- | -- | -- | -- |
| -- | Redevelopment Coordinator | 11 | 22,280 | 22,280 | -- | -- | -- | -- |
| -- | Mechanical Engineer | 13 | 26,962 | 26,962 | -- | -- | -- | -- |
| -- | Program Assistant | 4 | 16,111 | 16,111 | -- | -- | -- | -- |
| -- | Specifications Division | 11 | 16,111 | 16,111 | -- | -- | -- | -- |
| -- | Specifications Division | 11 | 21,019 | 21,019 | -- | -- | -- | -- |
| -- | Field Inspector | 3 | 17,500 | 17,500 | -- | -- | -- | -- |
| -- | Field Inspector | 3 | 17,500 | 17,500 | -- | -- | -- | -- |
| -- | Director of Force Account | 12 | 26,151 | 26,151 | -- | -- | -- | -- |
| -- | Secretary | 4 | 12,106 | 12,106 | -- | -- | -- | -- |
| Total Salaries | | | 329,267 | 269,703 | 55,978 | -- | 3,506 | -- |
| Employee Benefit Contributions | | | 82,417 | 26,971 | 54,449 | -- | -- | -- |
| Grand Total | | | <u>\$411,584</u> | <u>\$296,674</u> | <u>\$110,427</u> | -- | <u>\$4,483</u> | -- |

6. Divisions of Planning and Redevelopment and Construction Management

| I. All Positions (Current and Proposed) | | Schedule of Funds Required for Currently Filled Positions | | Fed /State Operating | | CDBG | | Development | | Other | |
|---|-------------|---|-----------|----------------------|--|------|--|-------------|--|----------|--|
| | Total | Fed /State | Operating | | | | | | | | |
| Salary | \$1,202,611 | \$554,086 | \$273,699 | \$83,839 | | | | \$123,037 | | \$27,210 | |
| Employee Benefits | 315,653 | 112,197 | 144,940 | 20,960 | | | | 30,754 | | 6,802 | |
| Total | 1,518,264 | 667,041 | 418,639 | 104,799 | | | | 153,791 | | 34,012 | |
| II. Vacant Positions | | | | | | | | | | | |
| Salary | 6,914 | 39,001 | 9,770 | -- | | | | 3,586 | | -- | |
| Employee Benefits | 6,407 | 26,021 | 6,111 | -- | | | | 897 | | -- | |
| Total | 411,504 | 296,023 | 110,427 | -- | | | | 4,483 | | -- | |
| III. Currently Filled Positions (1 - 11) | | | | | | | | | | | |
| Salary | 931,304 | 489,143 | 217,721 | 83,839 | | | | 119,431 | | 27,210 | |
| Employee Benefits | 231,316 | 86,226 | 90,491 | 20,960 | | | | 29,857 | | 6,802 | |
| Total | \$1,166,680 | \$570,369 | \$308,212 | \$104,799 | | | | \$149,288 | | \$34,012 | |



Projected Capital Improvement Expenditures

I. Fiscal Year 1981

| | 4/1/80 - 6/30/80 | 7/1/80 - 9/30/80 | 10/1/80 -12/31/80 | 1/1/81-3/31/81 | Total |
|---------|------------------|------------------|-------------------|------------------|-------------------|
| EDA | \$338,030 | \$ 1,311,437 | \$1,638,495 | \$3,256,295 | \$6,544,257 |
| | 124,987 | 36,570 | 739,465 | 1,235,644 | 2,460,666 |
| ization | -0- | 15,000 | 583,400 | 2,246,875 | 2,845,275 |
| | <u>463,017</u> | <u>1,687,007</u> | <u>2,961,360</u> | <u>6,738,814</u> | <u>11,850,193</u> |

II. Fiscal Year 1982

| | 4/1/81-6/30/81 | 7/1/81-9/30/81 | 10/1/81-12/31/81 | 1/1/82-3/31/82 | Total |
|---------|------------------|------------------|------------------|------------------|-------------------|
| EDA | 2,378,807 | 1,974,700 | 1,394,926 | 338,689 | 6,087,122 |
| | 2,034,121 | 1,256,297 | 641,212 | 223,100 | 4,154,730 |
| ization | 2,457,761 | 2,963,937 | 4,011,152 | 2,320,110 | 11,753,010 |
| | <u>6,870,689</u> | <u>6,194,984</u> | <u>6,047,290</u> | <u>2,881,889</u> | <u>21,994,862</u> |

i.

Federal Capital Improvement Programs
Funds Remaining to be Spent

| | Capital Funds | Administration |
|--------------|---------------|----------------|
| Conventional | | |
| 0 - 79 | \$11,821,755* | \$ 440,133 |
| - V | 4,028,440 | 148,109 |
| | 1,093,983 | -0- |

* excludes TPP and Urban Initiatives

Estimated Expenditures for FY 1981

| | Capital Funds | Administration | % /Balance |
|--------------|---------------|----------------|------------|
| Conventional | 3,983,145 | 149,645 | 34% |
| - V | 2,011,220 | 74,054 | 50% |
| | 546,882 | -0- | 50% |
| | 6,541,247 | 223,699 | NA |

| | Estimated Expenditures for FY1982 | | |
|--------------|-----------------------------------|---------|-----|
| Conventional | 3,823,210 | 132,040 | 30% |
| -V | 2,011,220 | 74,055 | 50% |
| | 546,882 | -0- | -0- |
| | 6,381,312 | 206,095 | NA |

State Capital Improvement Programs

Funds Remaining to be Spent

| | Capital Funds (est.)* | Administration ** |
|--|-----------------------|-------------------|
| EOCD Conventional (Phase I-V + 1977-81) | \$5,689,797 | To be determined |
| Pilot | 8,046,055 | To be determined |
| Total | \$13,278,690 | To be determined |

* estimate includes amounts for A + E services and inspection fees

** amounts for administration are subject to negotiation with EOCD however,
\$175,459.54 in expenses have been incurred as of 3/31/80.

Estimated Expenditures for FY 1981

| | Capital Funds | Administration | % Balance |
|-------------------|---------------|------------------|-----------|
| EOCD Conventional | 32,015,080 | To be determined | 35.4% |
| Pilot | 445,586 | To be determined | 5.5% |
| Total | 2,460,666 | To be determined | NA |

Estimated Expenditures for FY 1982

| | Capital Funds | Administration | % Balance |
|-------------------|---------------|------------------|-----------|
| EOCD Conventional | 3,229,312 | To be determined | 56.76% |
| Pilot | 924,918 | To be determined | 11.50% |
| Total | 4,154,730 | To be determined | NA |

1. Federal Stabilization Program

I. Fiscal Year 1981 (based on budget submission to HUD)

| Capital Expenditures | Administration | % Balance |
|----------------------|----------------|-----------|
| \$2,845,275 | \$162,430 | 16.78% |

II. Fiscal Year 1982

| Capital Expenditures | Administration | % Balance |
|----------------------|----------------|-----------|
| \$11,753,010 | 671,018 | 67.32% |

* Based on projected rate of expenditure BHA can expect to draw down approximately 86.1% of its requested 968,000 in administration funds for its HUD Stabilization Program during fiscal years 1981 and 1982.



INTEROFFICE COMMUNICATION

July 15, 1980

TO: L. H. Spence, Receiver/Administrator

AT:

FROM: Elspeth Taylor, Assistant Administrator for Administration

AT:

SUBJECT: Staffing of Planning and Redevelopment and Construction Management Divisions

BHA 2

In accordance with the memo of July to me from Jeff Lines, full staffing of the Department's of Planning and Redevelopment and Construction Management will require \$1,578,264 for FY81 for salary and employee benefit expenses. However, existing budgets for funding these expenses only include approximately \$359,000 from federal and state operating programs, \$241,000 from federal modernization programs, approximately \$180,000 from the stabilization program for a total of only \$780,000. Thus the existing plans for funding these departments could result in serious and insupportable burdens on the federal and state operating budgets unless administrative budgets with adequate levels of funding are requested and approved from federal and state modernization programs.

Using the proposed staffing patterns and the recently projected capital improvement expenditure projections it would appear that approximately 9% of each capital improvement program handled by the BHA will be necessary to provide adequate staff funding for Planning & Redevelopment and Construction Management activities, even without considering general BHA overhead expenditures (rent, etc.) which cannot be included in modernization program administrative budgets.

If the BHA's existing modernization (and development) budgets are successfully renegotiated such that approximately 9% of the capital improvement program funds are budgeted for administrative expenses of these programs, the proposed staffing pattern (plus employee benefit expenses) will be supported by these program budgets with only \$359,000 (salaries plus benefits) charged to federal and state operating programs. Since there are significant other demands on these operating budgets it is suggested that efforts be made for FY82 such that the Construction Management and Planning and Redevelopment departments obtain enough additional funding of administrative expenses from modernization, planning or redevelopment programs that no salary cost allocations must be made to the operating programs.

For FY81 the attached charts show the levels and sources of funding necessary to provide adequate funding for the BHA's administrative expenses of these programs for FY81 with \$359,000 budgeted and charged to the federal and state operating programs.

ET/jc

State Capital Improvement Programs

Funds Remaining to be Spent

| | Capital Funds (est.)* | Administration ** |
|-----------------|-----------------------|-------------------|
| CD Conventional | 5,689,797 | 512,081 |
| lot | 8,046,055 | 724,144 |
| total | 13,735,852 | 1,236,225 |

* estimate includes amounts for A & E and inspection fees

** amounts for administration estimated at 9% of capital funds

Estimated Expenditures for FY 1981

| | Capital Funds | Administration | % Balance |
|-----------------|---------------|----------------|-----------|
| CD Conventional | \$ 2,015,080 | 181,357 | 35.4% |
| lot | 445,586 | 40,102 | 5.5% |
| total | 2,460,666 | 221,459 | NA |

Estimated Expenditures for FY 1982

| | Capital Funds | Administration | % Balance |
|-----------------|---------------|----------------|-----------|
| CD Conventional | 3,229,812 | 290,683 | 56.76% |
| lot | 924,913 | 83,242 | 11.50% |
| total | 4,154,725 | 373,925 | NA |

Federal Stabilization Program

I. Estimated Expenditures for FY1981

| Capital Expenditures | Administration* | % Balance |
|----------------------|-----------------|-----------|
| \$2,845,275 | 256,075 | 16.78 |

II. Estimated Expenditures for FY 1982

| Capital Expenditures | Administration* | % Balance |
|----------------------|-----------------|-----------|
| \$11,753,010 | 1,057,770 | 67.32% |

* amounts for administration estimated at 9% of Capital funds.

Federal Capital Improvement Programs

| | Capital Funds* | Administration** |
|-----------------|----------------|------------------|
| UD Conventional | \$11,821,755 | \$ 1,063,958 |
| 1970 - 1979 | | |
| DBG I - V | 4,028,440 | 362,560 |
| Total | 15,850,195 | 1,426,518 |

* excludes TPP Urban Initiatives and EDA

** amounts for administration estimated at 9% of capital funds.

Estimated Expenditures for FY 1981

| | Capital Funds | Administration | % Balance |
|-----------------|---------------|----------------|-----------|
| UD Conventional | \$3,983,345 | \$358,474 | 34% |
| DBG I - V | 2,014,220 | 181,279 | 50% |
| Total | 5,997,565 | 539,753 | NA |

Estimated Expenditures for FY 1982

| | Capital Funds | Administration | % Balance |
|-----------------|---------------|----------------|-----------|
| UD Conventional | \$3,525,910 | \$317,332 | 30% |
| DBG I - V | 2,014,220 | 181,279 | 50% |
| Total | 5,540,130 | 498,611 | NA |

SUMMARY OF POSITIONS/DEPARTMENTS AND PROPOSED FUNDING SOURCES FOR FISCAL YEAR 1981

-- includes salaries of all current positions as well as proposed positions contained in requests for Division of Planning and Redevelopment and Division of Construction Management

| I. Division/Status | Salary | Fed./State Modernization | Fed./State Operating | CDMG | Development |
|--------------------------|-------------------------------|--------------------------|----------------------|---------|-------------|
| Planning & Redevelopment | 494,486 | 173,885 | 153,024 | 44,560 | 123,017 |
| Construction Management | 732,944 | 512,726 | 134,468 | 85,750 | -- |
| Finance & Accounts | 35,181 | 20,592 | -- | 14,589 | -- |
| Total | 1,262,611 | 707,203 | 287,492 | 144,899 | 123,017 |
| II. Division/Status | Employee Benefit Contribution | Fed./State Mod. | Fed./State Operating | CDMG | Development |
| Planning & Redevelopment | 123,621 | 43,471 | 38,256 | 11,140 | 30,754 |
| Construction Management | 183,236 | 128,181 | 33,618 | 21,437 | -- |
| Finance & Accounts | 8,796 | 5,148 | -- | 3,648 | -- |
| Total | 315,653 | 176,800 | 71,874 | 36,225 | 30,754 |
| Grand Total (I + II) | 1,578,264 | 884,003 | 359,366 | 181,124 | 153,771 |



INTEROFFICE COMMUNICATION

June 20, 1980

TO: Wilbur Best, Al Griffith, and Bob McNabb, District Directors
Sandra Henriquez, Joseph McIlamara, and Claricia Mitchell, Housing Managers

AT:

FROM: Jeff Lines and Olivia Golden, Administration

AT:

SUBJECT: FY81 Project-Based Budgets

In order to give local managers the control over available resources that is necessary for effective administration, the BHA is now moving towards a project-based budget process, which will eventually involve both decentralized development of budget requests and decentralized control of expenditures. The first two steps in this process are (1) the development of project-based Fiscal Year 1981 budgets for West Broadway, Franklin Field, and Mission Hill, to take place early this summer; and (2) the development of project-based Fiscal Year 1982 budgets for those three projects plus about eight or nine others, to take place in late summer and early fall. Fiscal Year 1981 (FY81) is the year now in progress, running from April 1980 to March 1981, and Fiscal Year 1982 (FY82) is the year from April 1981 to March 1982.

The purpose of the FY81 project-based budgets is primarily for everybody concerned to learn the process -- for us to learn how best to present the issues and provide the necessary information, and for you to learn how to put together a budget that reflects your needs and priorities. An additional purpose of the FY81 budgets in Franklin Field and D Street is to get additional funding from DCA, which has made a tentative commitment to additional funding for pilot sites that develop project-based budgets.

Schedule for the FY81 Project-Based Budgets

We have scheduled a meeting on Thursday, June 26 at 9:30 AM to introduce you to project-based budgeting and to go over the information contained in the Attachments to this memo. At that meeting, we will schedule additional meetings at each of the projects to go over specific questions that arise as you work on the budgets. We will be available to meet with you at the sites or answer questions on the phone as often as you find helpful throughout the process.

Your completed budget requests are tentatively due in Central Office on Friday, July 18. They will then be reviewed by staff from both Management and Administration, and any revisions will be discussed with you. The review process should be completed and your final FY81 budgets available by early August.

Attachments to this Memo

The Attachments to this memo provide the basic information you will need to prepare project-based budgets.

Attachment A is a glossary which provides general definitions of basic budgeting terms and of the budget categories for expenditures and income. You will probably want to look at this glossary before trying to work with the more detailed information in Attachments B and C.

Attachment B contains (1) detailed instructions for completing the Project-Based Budget Request form, (2) the form itself, and (3) "back-up" forms with space for you to explain and support your requests.

Finally, Attachment C contains information about expenditures and income for each of the three projects in fiscal years 1978-1980, which you may find useful in preparing your requests.

If you have questions at any time, please feel free to call Jeff Lines or Olivia Golden (extensions 257 or 258). As the process continues, please let us know also if you have any suggestions about how it can be improved for FY82.

cc: Mary Kelly
David Gilmore

ATTACHMENT A

GLOSSARY

PART 1: Basic Terms

Account - In most budgets, expenditures and income are broken down into categories called accounts, which are identified by specific account numbers. For example, the BHA's state and federal budgets divide maintenance expenditures into three accounts: one account for in-house labor costs, one account for materials and supplies, and one account for contract costs. Because accounts are reported on separate lines of the budget form, they are also called line items.

Fiscal Year (FY) - A fiscal year is a period (usually 12 months) that is considered as a unit for the purposes of budgeting and fiscal planning. The BHA's fiscal year in both its federal and state programs runs from April 1st to March 31st. Presently we are operating in Fiscal Year 1981, which began on April 1, 1980 and will end on March 31, 1981.

PUM (Per Unit-Month) - PUM means per unit per month. A housing authority is required to show a per unit per month figure for every account in its budget, because PUM figures make it possible to compare the expenses of large and small housing authorities. The PUM figure is arrived at by dividing the total for a given account by the "UMA", or unit months available, which equals the number of units times the number of months in the fiscal year. This calculation is described more fully below.

UMA (Unit-Months Available) - UMA means the number of unit months of availability. This figure is arrived at by multiplying the number of units in a program (e.g. Chapter 200) by the number of months in the fiscal year (12). Therefore, the UMA figure for the BHA's Chapter 200 program in FY81 is $3,621 \text{ units} \times 12 \text{ months} = 43,452$. Using this number, the BHA arrived at PUM (per unit-month) figures for its FY81 Chapter 200 budget request by dividing account totals by 43,452. For example, the BHA requested a total of \$1,749,445 for maintenance labor, which was equivalent to a PUM request of $\$1,749,445 \div 43,452 = \40.26 .

PART 2: Expenditure Accounts

This section explains the meaning of each of the expenditure accounts or line items listed on the Project-Based Budget Request form included in this packet (Attachment B). These accounts are generally the same as the expenditure accounts in the BHA's state and federal budgets.

ADMINISTRATION

Salaries (Account # 4101) - This figure represents the salaries of managerial and clerical staff requested for your development. It generally will include the Housing Manager, the Assistant Manager for Maintenance Services, and clerical support staff.

Salaries (continued) - See Attachment C for a list of the administrative staff who have been charged to your development during the last two fiscal years.

Administrative Expenses Other Than Salaries (Account #4102) - This category includes such expenses as telephone lines, office supplies, maintenance and rental of office equipment, travel, postage, and legal fees. A general definition of the category would be non-salary expenses required to support the management of your development and not specifically included somewhere else.

TENANT SERVICES

Salaries (Account #4201) - This category contains the salaries of BHA tenant services staff. It has been filled in with a zero on the Project-Based Budget Request Form, because the tenant services staff are not assigned to individual developments. Your proportional share of tenant services staff time is included in the item called "Central Office Pro-Ration", which is described more fully below.

Recreation, Publications, and Other Services (Account #4202) - This figure represents the amount requested for recreational activities, publication of resident newsletters, and related services to tenants. In the BHA, most such expenditures are made by Central Office Tenant Services not by developments.

Contract Costs, Training, Other (Account #4203) - This figure represents the amount requested for tenant services to be provided by contract with an outside organization. In the BHA most such expenditures are made by Central Office, not individual developments.

UTILITIES

Water (Account #4310) - This figure represents projected development expenditures for water.

Electricity (Account #4320) - This figure represents projected development expenditures for electricity.

Gas (Account #4330) - This figure represents projected development expenditures for gas used for purposes other than heating.

Heating Fuel (Account #4340) - This figure represents projected development expenditures for heating fuel, which may be oil, gas, or purchased steam.

Heating Labor (Account #4350) - This figure represents the salaries of firemen performing maintenance work on your development's heating system.

Other (Sewer) (Account #4390) - This figure represents the projected cost of sewage services to your development.

ORDINARY MAINTENANCE AND OPERATIONS

Ordinary maintenance means day-to-day repairs. It does not include replacement of equipment, modernization work, or any improvements that are designed to last more than one year, such as painting or refurbishing apartments. Long-term types of work (except modernization) are included under non-routine expenditures.

Labor (Account #4401) - This figure represents the salaries of all maintenance employees except firemen for the hours they record at your development. Attachment C gives the number of hours recorded at your development for each type of craft (carpenter, painter, plumber, etc.) during the past two fiscal years as well as the cost of those hours.

Materials and Supplies (Account #4402) - This figure represents the cost of materials requested for performing ordinary maintenance duties at your development. It includes both materials requested by your development from Central Stores and materials purchased separately by your development.

Contract Costs (Account #4503) - This figure represents the amount requested for ordinary maintenance work at your development which is done through a contract with an outside firm. See Attachment C for a list of the types of contracts and the cost for each type in your development during the last two fiscal years.

PROTECTIVE SERVICES

Protective Services are basically security services.

Labor (Account #44501)

This category includes the salaries of security guards and other in-house security staff. It has been filled in with a zero on the Project-Based Budget Request Form because in-house security staff are not assigned to individual developments. Your development's proportional share of the security staff's time is included in the Central Office pro-rata described below.

Material and Supplies (Account #4502) - This figure includes the costs of any materials used in maintaining or installing a security system or program such as a burglar alarm system. In the BHA, most such expenditures are made by Central Office security staff, not by individual developments.

Contract Costs (Account #4503) - This figure represents the amount requested for contracted security services at your development.

GENERAL EXPENSE

This category includes general costs that cut across the various specific functions of the Housing Authority.

Insurance (Account #4711) - This figure includes the cost of fire insurance, property insurance, workmen's compensation, public liability insurance, and boiler insurance. Because the Authority does not generally receive separate insurance bills for the different developments, the insurance figure for your development will be a proportionate share of the total BHA insurance bill, based on the number of units in your development. The detailed instructions for the Project-Based Budget Request Form (Attachment B) give the PUM (per unit-month) charge for insurance so you can compute your development's share.

Employee Benefit Contribution (Account 715) - This figure includes the BHA's payments to the State Retirement Board, to the employees' group health and life insurance plans, and to the state for unemployment compensation. In FY81, employee benefits equal approximately 25% of salaries.

Payment in Lieu of Taxes (Account #4740) - Authorities are not required to pay property taxes on their housing. They do however, make certain payments in lieu of taxes (PILOT) to the municipal government (Boston) to cover some of the costs of municipal services. These payments are much less than what regular property taxes would be. For state-aided developments, the BHA makes payments in accordance with an agreement between it and the city of Boston; the detailed instructions in Attachment B give the amount of the agreed payment for your development. In federally aided housing, an authority is required to pay 10% of dwelling rental income minus utility expenses. Because utility expenses now exceed dwelling rental income, the BHA will not be making a payment in lieu of taxes for its federally aided developments this year.

TOTAL PROJECT-BASED OPERATING EXPENSES

For the purposes of project-based budgeting, we have chosen to define project-based expenditures as those expenditures identified specifically with one development and assigned ("charged") to that development by the BHA's accounting system. All the requests above this line on the Project-Based Budget Request Form should be for project-based operating expenses.

CENTRAL OFFICE PRO-RATION - Expenditures that support many developments and cannot easily be identified with one development (for example, the salaries of Central Office departments such as Personnel, Finance and Accounts, Purchasing, and so forth) are allocated ("pro-rated") to the developments according to rough measures of the amount of Central Office services each development is likely to use. The rough measure most often used, and the one we will use here, is the number of units in each development. The detailed instructions for the Project-Based Budget Request Form (Attachment B) give the Central Office pro-ration per unit-month, so that you can multiply by your development's unit-months available to calculate your development's total pro-ration.

NON-ROUTINE EXPENDITURES

Basically, Nonroutine Expenditures include any type of work which is designed to last longer than one year; probably the largest category of non-routine expenditures is the replacement of stoves and refrigerators. Because the funds available for non-routine maintenance are extremely limited and because sources of funds other than the BHA's regular federal and state operating budgets may have to be identified, the detailed instructions (Attachment B) give special rules for requests in this category.

PART 3: Income Categories

This section explains the two categories of income on the Project-Based Budget Request form (Attachment B). Because (for reasons of simplicity) these categories are different from the income categories on the BHA's Federal and State budget forms, we have not given them account numbers.

Rental Income - This category represents the expected rental income from your project if the vacancy rate remains approximately stable.

Accounts Receivable Charges or Credits - If you expect to collect less than 100% of the FY81 rent roll, this category represents the portion of the rent roll that will not be collected. It is subtracted from "Rental Income" to arrive at Total Income. For example, if you expect to collect 95% of the rent roll, 5% would be subtracted from Rental Income as Accounts Receivable charges.

Sometimes, however, when many tenants still living in the development owe substantial back rent, you may expect to collect more than 100% of the rent roll, because you may collect so much back rent from previous months that the unpaid rent from the current month is more than offset. In this situation, you are not really generating more income for the BHA than if the rent was being paid on time; you are just collecting the rent now instead of when it was due. However, to provide an incentive for increased rent collections, we will treat amounts collected above 100% of the rent roll as if they represented increased income.

Therefore, if you expect to collect more than 100% of the FY81 rent roll, this category ("Accounts Receivable Charges or Credits") represents the additional income to be collected beyond the FY81 rent roll, and it is added to "Rental Income" to arrive at Total Income. For example, if you expect to collect 105% of the rent roll, 5% would be added to Rental Income as Accounts Receivable credits.

ATTACHMENT B

Detailed Instructions for Completing the Project-Based Budget Request for FY81

These instructions provide guidelines for estimating each of the items required by the Project-Based Budget Request form. The guidelines often refer to historical information about your development's income and expenditures over the past two or three fiscal years; you will find this information in Attachment C.

Please use the back-up sheets attached to the Project-Based Budget Request form to indicate briefly the basis for each of your estimates. There are no separate instruction sheets for the back-up forms.

If you have questions or need more information, please call Jeff Lines or Olivia Golden (extensions 257, 258). We will be available to meet with you as often as necessary while you are preparing your requests.

I. Instructions for Computing UMA (Unit-Months Available)

Multiply the number of programmed units in your development by 12 (number of months in the fiscal year) to give the unit-months available. As explained in the Glossary, you will divide each of your total requests by this UMA figure to get a PUM (per unit-month) request.

II. Instructions for Completing the Income Section

Rental Income - Attachment C gives your development's average monthly rent roll for March - June 1980. To make an initial estimate of Rental Income for FY81, multiply this figure by 12 to convert from monthly to annual. When the July 1 rent roll (which will reflect a Tenant Status Review) becomes available, we will let you know whether to modify this initial estimate.

Accounts Receivable Charges or Credits - To project Accounts Receivable Charges or Credits for FY81, you will first need to estimate the percent of rent roll you expect to collect in FY81. Attachment C provides historical information, and you may want to consult Central Office Management staff about an appropriate target percent.

If the resulting estimate is under 100%, your Accounts Receivable Charge =
$$\frac{(100 - \text{your target \%})}{100} \times \text{your rental income.}$$
 Enter the result with parentheses around it on the Project-Based Budget Request form to show it is a charge, not a credit.

If your estimated percent of rent roll is over 100%, your Accounts Receivable Credit =
$$\frac{(\text{your target \%} - 100)}{100} \times \text{your rental income.}$$

Total Income - If your Accounts Receivable figure is a charge, subtract it from Rental Income to give Total Income. If your Accounts Receivable figure is a credit, add it to Rental Income to give Total Income.

III. Instructions for Completing the Expenditure Sections

ADMINISTRATION

Salaries (Account #4101) - Attachment C gives the administrative positions charged to your development in FY79 and FY80, the hours charged for each position, and the number of full-time equivalent positions represented by those hours. For example, 1,820 hours (35 hours a week x 52 weeks) is the equivalent of one full-time staff person, and 3,640 hours is the equivalent of two full-time people, even though the hours might actually be charged by several part-time people.

To project FY81 expenditures, you should list the administrative staff positions you are requesting and the proportion of full-time you expect to use each position. You should estimate less than full-time if the position:

- is shared among developments (example: a Housing Manager who splits his time among three developments);
- is part-time (example: a secretary who works two days a week); or
- is expected to be vacant for part of FY81 (example: a now vacant position you expect to fill in September).

Once you have identified the positions and the proportion of full-time, multiply by the following salaries to get the dollar request:

| <u>Position</u> | <u>FY81 Salary (Step III)</u> |
|----------------------------|-------------------------------|
| Clerk II | \$ 9,753.00 |
| Clerk Typist II | 9,753 |
| Clerk I | 10,629 |
| Clerk Typist I | 10,629 |
| Clerk Typist | 11,586 |
| Senior Clerk | 11,586 |
| Housing Manager Trainee | 13,763 |
| Housing Manager II | 19,426 |
| Housing Manager I | 23,292 |
| Ass't Mgr. Maint. Serv. II | 17,823 |
| Ass't Mgr. Maint. Serv. I | 21,271 |

For example, Development A has a Housing Manager I and an Assistant Manager I for Maintenance Services who share their time between Development A and another development of equal size, one full-time Clerk Typist, and one Clerk II who comes in two days a week. Development A's request is for:

| | |
|--|-----------------|
| Housing Manager I = 0.5 (share of time) x 23,292 | = \$11,646 |
| Ass't Mgr Maint Serv I = 0.5 x 21,271 | = 10,636 |
| Clerk Typist = 1 x 11,586 | = 11,586 |
| Clerk II = 0.4 (2 days out of 5) x 9,753 | = 3,901 |
| | <u>\$37,769</u> |

Non-Salary Expenses (4102) - Attachment C gives total non-salary administrative expenses for the past three fiscal years, as well as a detailed breakdown of FY80 expenditures by type and a further breakdown of telephone expenditures. The totals for past fiscal years include approximately 1.28 PJM for prorated Central Office expenditures which you should not include in your FY81 request.

Based on this historical information and any changes you feel are appropriate, estimate FY81 needs in this category.

TENANT SERVICES

Salaries (Account #4201) - This account has already been filled in with a zero, because Tenant Services staff are not assigned to individual developments.

Recreation, Other Services (4202)

Contract Costs, Training, Other (Account #4203) - Based on the historical information in Attachment C and any changes you feel are appropriate, estimate FY 81 needs in these categories.

UTILITIES

Attachment C gives the consumption figures for your development for the past three fiscal years. Based on this information, estimate FY81 consumption and multiply by the following prices to get the FY81 request:

| <u>Utility</u> | <u>Price</u> |
|----------------|-------------------------|
| Water | \$7.55/1,000 cubic feet |
| Electricity | \$ 0.0774/kwh |
| Gas | \$ 0.00514/cubic foot |
| Fuel: | |
| Steam | To be provided |
| Oil | \$ 0.8857/gallon |
| Sewer | 3.59/1,000 cubic feet |

Heating Labor (4350)

Attachment C gives the hours worked by firemen at each development in FY79 and FY80. Based on this information, estimate the hours for FY81 and multiply by the FY81 salary rate of \$ 7.48 per hour. Multiply this dollar figure by 2/3 to obtain your final request for Heating Labor; the other 1/3 of the firemen's salaries is charged to Maintenance Labor (Account #4401; see instructions below), because for 1/3 of their time, firemen perform regular maintenance tasks unrelated to heating.

ORDINARY MAINTENANCE AND OPERATION

Labor (4401) - Attachment C gives the hours worked at your project for each type of maintenance craft in FY79 and FY80. Based on this information and your own judgment about FY81 needs, estimate FY81 hours for each craft and multiply by the appropriate hourly rate from Table B-1 to get a dollar request for each craft.

- * This rate does not include premiums for afternoon or evening shifts. If you expect substantial use of these shifts, we will provide information on the premium rates.

Your total request for Maintenance Labor equals the sum of (1) your dollar requests for all crafts; (2) 1/3 of the salary costs for firemen that you calculated under Heating Labor (4350) above; and (3) your project's pro-rated share of sick and vacation time for Central Maintenance craftsmen, which is equal to \$1.38 PUM times your project's UMA. The sum of these three numbers will be your request for Maintenance Labor.

Table B-1

| <u>Craft</u> | <u>Hourly Rate for Regular Time</u> * | <u>Hourly Rate for Overtime</u> |
|------------------------|---|-------------------------------------|
| Carpenter | \$ 9.32 | 13.98 |
| Bricklayer | 9.52 | 14.28 |
| Tile Setter | 9.32 | 13.98 |
| Plumber | 10.84 | 16.26 |
| Plasterer | 9.82 | 14.73 |
| Cement Mason | 9.32 | 13.98 |
| *Steamfitter | 10.63 | 16.02 |
| Steamfitter/Welder | 10.63 | 16.02 |
| Welder | 10.63 | 16.02 |
| Oil Burner Mechanic | 10.63 | 16.02 |
| Electrician | 10.94 | 16.41 |
| Glazier | 9.88 | 14.82 |
| Painter - Brush | 9.20 | 13.80 |
| Journeyman/Mechanic | 8.54 | 12.81 |
| <hr/> | | |
| Auto Mechanic | \$8.93 | 13.40 |
| Applianceman | 7.31 | 10.97 |
| Laborer | 7.16 | 10.74 |
| Housing Utility Worker | 5.55 | 8.33 |

* These rates do not include premiums for afternoon or evening shifts. If you expect substantial use of these shifts, we will provide information on the premium rates.

Materials and Supplies (4402) - Attachment C gives total project expenditures for maintenance materials and supplies during the past three fiscal years and breaks down FY80 expenditures according to the type of materials. Based on this information and any changes you feel are appropriate, estimate FY81 needs in this category.

Contract Costs (4403) - Attachment C gives total expenditures for contracted maintenance at each project during the past three fiscal years and breaks down FY80 expenditures according to the type of contract. Based on this information and any changes you feel are appropriate, estimate FY81 needs in this category.

PROTECTIVE SERVICES

Labor (4501) - This account has already been filled in with a zero, because Protective Services staff are not assigned to individual developments.

Material and Supplies (4502) - Attachment C gives project expenditures for protective services materials and supplies during the past three fiscal years. Based on this information and any changes you feel are appropriate, estimate FY81 needs in this category.

Contract Costs (4503) - Attachment C gives expenditures for contracted protective services at each project during the past three fiscal years. Based on this information and any changes you feel are appropriate, estimate FY81 needs in this category.

GENERAL EXPENSE

Insurance (4711) - Your project's share of the BHA's FY81 costs for property insurance, fire insurance, public liability insurance, workmen's compensation, and related items is \$ 6.17 PUM for state developments and \$ 8.94 PUM for Federal developments. Calculate your FY81 request by multiplying the appropriate PUM figure times your development's UMA.

Employee Benefit Contribution (4715) - Employee benefits in FY81 equal approximately 25% of salaries. Therefore, to calculate your development's request for employee benefits, add your requests for account #4101 (Administrative Salaries) and account #4401 (Maintenance Labor) and multiply the sum by 0.25.

Payment In Lieu of Taxes (4740) - In FY81, state projects will make payments in lieu of taxes according to an agreement negotiated with the city a number of years ago; Federal projects will make no payments (enter \$0 as your request). Under the agreement with the city, no payment (enter \$0) is made for D Street and \$18,144 for Franklin Field.

TOTAL PROJECT-BASED OPERATING EXPENSES - Add your requests for accounts 4101 - 4740 and enter the total here.

CENTRAL OFFICE PRO-RATION - Your development's share of the BHA's Central Office costs is \$29.38 PUM for state developments and \$ 31.19 PUM for Federal developments. Calculate your development's total Central Office pro-ration by multiplying the appropriate PUM figure times your development's UMA.

TOTAL OPERATING EXPENDITURES - Add total project-based operating expenses plus central office pro-ration and enter the result here.

NON-ROUTINE EXPENDITURES - Three types of requests should be included under non-routine expenditures: extraordinary maintenance (emergency repairs), betterments and additions (new equipment and other capital expenditures not intended to replace existing structures), and equipment replacement (stoves, refrigerators, a new lawnmower, etc.). Please provide an estimate of your total FY81 needs in these areas on the Project-Based Budget Request form, along with a back-up page that breaks the request down into the three types of non-routine expenditures and explains the urgency of the need. Because funding for non-routine expenditures is extremely tight, you should focus on your highest priority needs, as we may find ourselves unable to fund even well-justified requests.

BACK-UP FORM FOR INCOME

Rental Income

Accounts Receivable Charges or Credits

BACK-UP FORM FOR ADMINISTRATION

Salaries

3

Other Expenses

BACK-UP FORM FOR TENANT SERVICES

Recreation, Publication, Other Services

Contract Costs, Training, Other

BACK-UP FORM FOR UTILITIES

Water

Electricity

Gas

Heating Fuel

Heating Labor

Other (Sewer)

BACK-UP FORM FOR ORDINARY MAINTENANCE

Labor

Materials and Supplies

Contract Costs

BACK-UP FORM FOR PROTECTIVE SERVICES

Material and Supplies

Contract Costs

BACK-UP FORM FOR GENERAL EXPENSE

Insurance

Employee Benefit Contribution

3

Payment In Lieu of Taxes

BACK-UP FORM FOR NON-ROUTINE EXPENDITURES

Extraordinary Maintenance

Betterments and Additions

Equipment Replacement



Attachment C

Historical Income and Expenditure Information for

D Street (200-1), Franklin Field (200-11),

and Mission Hill (2-3)

I. Income Information

| <u>Development</u> | <u>Av'g Monthly Rent Roll Mar. - June 1980</u> | <u>Av'g % of Rent Roll Collected, Mar. - May 1980</u> |
|-------------------------|--|---|
| D Street (200-1) | \$51,018 | 93.9 |
| Franklin Field (200-11) | 22,233 | 99.6 |
| Mission Hill (2-3) | 29,675 | 105.0 |

II. Expenditure Information

ADMINISTRATION
Salaries (4101)

| <u>Development and Positions Charged To It</u> | <u>Hours Charged</u> | | <u>Approx. full- time equivalents</u> | |
|--|--------------------------|-------------|---|-------------|
| | <u>FY79</u> | <u>FY80</u> | <u>FY79</u> | <u>FY80</u> |
| <u>D Street</u> | | | | |
| Clerk Typist II | 693 | 586 | 0.4 | 0.3 |
| Clerk Typist | 3,635 | 2,904 | 2 | 1.6 |
| Housing Manager II | 423 | 0 | 0.2 | 0 |
| Housing Manager I | 1,855 | 1,890 | 1 | 1 |
| Ass't Manager, Maint. I | 2,177 | 2,181 | 1.2 | 1.2 |

Franklin Field

| | | | | |
|----------------------|-------|-------|-----|-----|
| Clerk II | 40 | 0 | * | 0 |
| Clerk Typist II | 1,211 | 560 | 0.7 | 0.3 |
| Clerk Typist | 1,823 | 1,855 | 1 | 1 |
| Housing Manager I | 1,820 | 1,820 | 1 | 1 |
| Ass't Mgr. Maint. I | 1,316 | 706 | 1.4 | 0.4 |
| Ass't Mgr. Maint. II | 32 | 0 | * | 0 |

* Under 0.1



Development and
Positions Charged
to it, continued

Hours
Charged
FY79 FY80

Approx.
of
full-time
equivalents
FY79 FY80

Mission Hill

| | | | | |
|-----------------------|-------|-------|-----|-----|
| Clerk II | 1,745 | 1,786 | 1.0 | 1.0 |
| Clerk Typist II | 701 | 0 | 0.4 | 0 |
| Senior Clerk | 2,338 | 1,820 | 1.3 | 1.0 |
| Work Order Clerk | 16 | 0 | * | 0 |
| Housing Man. Trainee | 0 | 748 | 0 | 0.4 |
| Housing Man. II | 466 | 0 | 0.3 | 0 |
| Housing Man. I | 1,575 | 1,015 | 0.9 | 0.6 |
| Asst.Mgr.Maint.Serv.I | 2,173 | 2,118 | 1.2 | 1.2 |
| Heating Plant Super | 4 | 10 | * | * |

*Under 0.1

Non-Salary Expenditures (4102)

Development

Administrative Expenditures
Other Than Salaries

| | FY78 | FY79 | FY80 |
|----------------|----------|----------|----------|
| D Street | \$18,500 | \$13,500 | \$22,000 |
| Franklin Field | 4,300 | 7,600 | 12,900 |
| Mission Hill | 18,000 | 18,000 | 14,500 |

As indicated in the text, most of these expenditures (about \$1.28 PUM) are for pro-rated Central Office expenditures which will not be included in the project-based part of your request. (They will be included in the lump sum Central Office pro-ratation). The next table shows only those categories which you will probably want to think about because they contain project-based as well as pro-rated expenditures. We will provide more details when we meet with you.

Development and
Positions Charged
to it, continued

Hours
Charged
FY79 FY80

Approx.
of
full-time
equivalents
FY79 FY80

Mission Hill

| | | | | |
|---------------------------|-------|-------|-----|-----|
| Clerk II | 1,745 | 1,786 | 1.0 | 1.0 |
| Clerk Typist II | 701 | 0 | 0.4 | 0 |
| Senior Clerk | 2,338 | 1,820 | 1.3 | 1.0 |
| Work Order Clerk | 16 | 0 | * | 0 |
| Housing Man. Trainee | 0 | 748 | 0 | 0.4 |
| Housing Man. II | 466 | 0 | 0.3 | 0 |
| Housing Man. I | 1,575 | 1,015 | 0.9 | 0.6 |
| Asst. Mgr. Maint. Serv. I | 2,173 | 2,118 | 1.2 | 1.2 |
| Heating Plant Super | 4 | 10 | * | * |

*Under 0.1

Non-Salary Expenditures (4102)

Development

Administrative Expenditures
Other Than Salaries

| | FY78 | FY79 | FY80 |
|----------------|----------|----------|----------|
| D Street | \$18,500 | \$13,500 | \$22,000 |
| Franklin Field | 4,300 | 7,600 | 12,900 |
| Mission Hill | 18,000 | 18,000 | 14,500 |

As indicated in the text, most of these expenditures (about \$1.28 PUM) are for pro-rated Central Office expenditures which will not be included in the project-based part of your request. (They will be included in the lump sum Central Office pro-ratation). The next table shows only those categories which you will probably want to think about because they contain project-based as well as pro-rated expenditures. We will provide more details when we meet with you.



For FY80, the major categories of non-salary administrative expenditures were as follows: FY80 Expenditures for:

| <u>Category</u> | <u>D Street</u> | <u>Franklin Field</u> | <u>Mission Hill</u> |
|------------------------|-----------------|-----------------------|---------------------|
| Telephone | \$3,531 | \$ 3,955 | \$4,832 |
| Xerox rent &supplies | 572 | 311 | 2,489 |
| Publications & Ads | 2,276 | 1,727 | 2,371 |
| Constable & Steno fees | 1,960 | 2,275 | 1,824 |
| Office Supplies | 2,022 | 1,017 | 1,769 |
| Consultants | 2,125 | 71 | 128 |
| Bank Service Charges | 1,193 | 301 | 544 |

The detailed breakdown of phone lines charged to each development in FY80 is:

| <u>Development and Phone Number</u> | <u>Basic Monthly Charge</u> | <u>Average Monthly Billing</u> |
|-------------------------------------|-----------------------------|--------------------------------|
| D Street | | |
| 268-2525 | \$ 19.54 | \$ 19.54 |
| 269-3560 | 17.94 | 17.94 |
| 268-5253 | 17.94 | 52.53 |
| 268-8860 | 98.47 | 147.60 |
| Franklin Field | | |
| 802-3816 | 20.82 | 20.82 |
| 288-6165 | 17.94 | 20.16 |
| 288-6526 | 17.94 | 17.94 |
| 282-6800 | 89.61 | 218.14 |
| 436-9622 | 5.00 | 5.00 |
| 436-9687 | 6.85 | 6.85 |
| 436-9688 | 5.00 | 5.00 |



| <u>Development and Phone Number, cont.</u> | <u>Basic Monthly Charge</u> | <u>Average Monthly Billing</u> |
|--|---------------------------------|------------------------------------|
| Mission Hill | | |
| 445-0104 | \$ 17.94 | \$ 38.97 |
| 807-2112 | 20.50 | 20.50 |
| 445-6340 | 112.64 | 187.09 |

TENANT SERVICES

Development

| | FY79 Expenditures for: | | FY80 Expenditures for: | |
|----------------|--|--|--|--|
| | <u>Recreation, Publication, Other Services</u> | <u>Contract Costs, Training, Other</u> | <u>Recreation, Publication, Other Services</u> | <u>Contract Costs, Training, Other</u> |
| D Street | \$ 302 | \$ 1,088 | \$ 35 | \$ 1,725 |
| Franklin Field | 195 | 2,715 | 19 | 1,100 |
| Mission Hill | 297 | 1,570 | 35 | 1,719 |



UTILITIES

| <u>Development and Utility</u> | <u>FY78</u> | <u>FY79</u> | <u>FY80</u> |
|------------------------------------|-------------|-------------|---------------|
| <u>D Street</u> | | | |
| Water (cu.ft.) | 8,570,000 | 8,522,200 | 9,099,000 |
| Electricity (kwh) | 3,229,200 | 3,084,300 | 2,966,400 |
| Gas (cu.ft.) | 7,537,900 | 6,787,200 | 6,828,100 |
| Fuel-Steam (lbs.) | 114,317,000 | 123,991,000 | 115,116,000 |
| Sewer (cu.ft.) | 8,570,000 | 8,522,200 | 9,099,000 |
| <u>Franklin Field</u> | | | |
| Water (cu.ft.) | 7,993,000 | 6,733,500 | 7,918,700 |
| Electricity(kwh) | 2,283,600 | 2,128,600 | 2,051,400 |
| Gas (cu.ft.) | 7,462,100 | 8,334,700 | 7,980,200 |
| Fuel-Oil (gal.) | 786,965 | 707,509 | not available |
| Sewer (cu.ft) | 7,993,000 | 6,733,500 | 7,918,700 |
| <u>Mission Hill</u> | | | |
| Water (cu.ft.) | 9,964,000 | 10,010,300 | 8,826,300 |
| Electricity(kwh) | 2,811,240 | 2,799,850 | 2,646,090 |
| Gas (cu.ft.) | 10,528,100 | 9,875,200 | 9,619,200 |
| Fuel-Oil(gal.) | 1,176,130 | 1,222,423 | not available |
| Sewer (cu.ft.) | 9,964,000 | 10,010,300 | 8,826,300 |



Heating Labor (4350)

| <u>Development</u> | <u>Firemen Hours Charged</u> | | <u>Approx. full-time equivalents</u> | |
|--------------------|------------------------------|-------------|--------------------------------------|-------------|
| | <u>FY79</u> | <u>FY80</u> | <u>FY79</u> | <u>FY80</u> |
| D Street | 0 | 60 | 0 | 0.03 |
| Franklin Field | 6,739 | 4,436 | 3.2 | 2.1 |
| Mission Hill | 4,042 | 5,727 | 1.9 | 2.7 |

ORDINARY MAINTENANCE AND OPERATION

Labor (4401)

| <u>Development and Craft</u> | <u>Hours Charged</u> | | <u>Approx. full-time equivalents</u> | |
|----------------------------------|----------------------|-------------|--------------------------------------|-------------|
| | <u>FY79</u> | <u>FY80</u> | <u>FY79</u> | <u>FY80</u> |
| <u>D Street</u> | | | | |
| Applianceman | 634 | 991 | 0.3 | 0.5 |
| Bricklayer | 100 | 84 | * | * |
| Carpenter | 2,776 | 2,335 | 1.3 | 1.1 |
| Cement Mason | 104 | 0 | * | 0 |
| Journeyman Mechanic-Cement Mason | 0 | 96 | 0 | * |
| Electrician | 972 | 1,274 | 0.5 | 0.6 |
| Glazier | 2,361 | 1,967 | 1.1 | 1.0 |
| Journeyman Mechanic-Glazier | 0 | 88 | 0 | * |
| Laborer | 24,627 | 22,704 | 11.8 | 10.9 |
| Service Worker | 0 | 392 | 0 | 0.2 |
| Mechanic (Auto) | 4 | 20 | * | * |

* Under 0.1



| <u>Project and Craft</u> | <u>Hours Charged</u> | | <u>Approx. full-time equivalents</u> | |
|--|----------------------|-------------|--------------------------------------|-------------|
| | <u>FY79</u> | <u>FY80</u> | <u>FY79</u> | <u>FY80</u> |
| <u>St., cont.</u> | | | | |
| Plasterer | 448 | 32 | 0.2 | * |
| Journeyman Mechanic- Plasterer | 0 | 232 | 0 | 0.1 |
| Plumber | 2,539 | 2,263 | 1.2 | 1.1 |
| Steamfitter | 1,084 | 1,134 | 0.5 | 0.6 |
| Journeyman Mechanic- Steamfitter/Welder | 0 | 204 | 0 | 0.1 |
| Welder | 60 | 108 | * | * |
| Painter | 1,604 | 3,120 | 0.8 | 1.5 |
| Summer Utility Worker | 184 | 0 | 0.1 | 0 |

Franklin Field

| | | | | |
|-----------------|--------|--------|-----|-----|
| Applianceman | 244 | 10 | 0.1 | * |
| Bricklayer | 460 | 6 | 0.2 | * |
| Carpenter | 2,780 | 2,705 | 1.3 | 1.3 |
| Cement Mason | 6 | 0 | * | 0 |
| Electrician | 722 | 356 | 0.4 | 0.2 |
| Glazier | 2,093 | 2,165 | 1.0 | 1.0 |
| Laborer | 15,325 | 19,749 | 7.4 | 9.5 |
| Service Worker | 0 | 776 | 0 | 0.4 |
| Mechanic (Auto) | 12 | 31 | * | * |
| Plasterer | 80 | 0 | * | 0 |
| Plumber | 2,586 | 2,636 | 1.2 | 1.3 |
| Steamfitter | 910 | 792 | 0.4 | 0.4 |

* Under 0.1



| <u>Project and Craft</u> | <u>Hours Charged</u> | | <u>Approx. full-time equivalent</u> | |
|---------------------------------|----------------------|-------------|-------------------------------------|-------------|
| | <u>FY79</u> | <u>FY80</u> | <u>FY79</u> | <u>FY80</u> |
| <u>Franklin Field, cont.</u> | | | | |
| Welder | 23 | 52 | * | * |
| Painter | 1,052 | 640 | 0.5 | 0.3 |
| Journeyman Mechanic- Painter | 0 | 16 | 0 | * |
| Tile Setter | 392 | 0 | 0.2 | 0 |
| Summer Utility Worker | 974 | 0 | 0.5 | 0 |

Mission Hill

| | | | | |
|-------------------------------------|--------|--------|------|------|
| Applianceman | 597 | 36 | 0.3 | * |
| Bricklayer | 60 | 72 | * | * |
| Journeyman Mechanic - Bricklayer | 0 | 549 | 0 | 0.3 |
| Carpenter | 4,856 | 2,872 | 2.3 | 1.4 |
| Journeyman Mechanic - Carpenter | 0 | 120 | 0 | 0.1 |
| Cement Mason | 182 | 42 | 0.1 | * |
| Electrician | 1,142 | 1,214 | 0.6 | 0.6 |
| Glazier | 1,964 | 2,054 | 0.9 | 1.0 |
| Laborer | 28,481 | 25,503 | 13.7 | 12.3 |
| Housing Utility Worker | 0 | 4,765 | 0 | 2.3 |
| Service Worker | 0 | 1,287 | 0 | 0.6 |
| Mechanic (Auto) | 8 | 2 | * | * |
| Plasterer | 793 | 35 | 0.4 | * |

* Under 0.1

Mission Hill, cont.

| | <u>Hours Charged</u> | | <u>Approx. full-time equiv.</u> | |
|-------------------------------------|----------------------|-------------|---------------------------------|-------------|
| | <u>FY79</u> | <u>FY80</u> | <u>FY79</u> | <u>FY80</u> |
| Plumber | 2,953 | 2,358 | 1.4 | 1.1 |
| Journeyman Mech.-Plumber | 0 | 18 | 0 | * |
| Steamfitter | 1,480 | 979 | 0.7 | 0.5 |
| Journeyman Mech.-Steamfitter/Welder | 0 | 547 | 0 | 0.3 |
| Welder | 92 | 52 | * | * |
| Painter | 2,322 | 1,528 | 1.1 | 0.7 |
| J. Mech. -- Painter | 0 | 16 | 0 | * |
| Tile Setter | 640 | 1,136 | 0.3 | 0.6 |
| Summer utility worker | 1,024 | 0 | 0.5 | 0 |

* under 0.1



Materials and Supplies (4402)

Development

Materials and Supplies
Expenditures

| | <u>FY78</u> | <u>FY79</u> | <u>FY80</u> |
|--|-------------|-------------|-------------|
|--|-------------|-------------|-------------|

| | | | |
|----------------|----------|----------|----------|
| D Street | \$46,700 | \$35,600 | \$39,500 |
| Franklin Field | 37,800 | 30,900 | 66,400 |
| Mission Hill | 42,100 | 55,400 | 62,200 |

Type of Material

FY80 Expenditures for

| <u>D Street</u> | <u>Franklin Field</u> | <u>Mission Hill</u> |
|-----------------|---------------------------|-------------------------|
|-----------------|---------------------------|-------------------------|

| | | | |
|-----------------|----------|-----------|----------|
| Paint | \$ 9,200 | \$ 10,000 | \$ 9,200 |
| Electrical | 3,700 | 6,000 | 7,700 |
| Plumbing | 9,800 | 16,800 | 9,400 |
| Auto Parts | 500 | 400 | 500 |
| Glazier | 1,200 | 4,100 | 400 |
| Appliances | 0 | 400 | 0 |
| Heating | 2,500 | 5,400 | 5,800 |
| Janitorial | 3,600 | 2,900 | 2,400 |
| Hardware | 8,500 | 5,100 | 4,200 |
| Building | 3,500 | 10,900 | 9,900 |
| Carpentry | 4,700 | 13,400 | 15,700 |
| Floor coverings | 100 | 100 | 100 |
| Grounds | 500 | 800 | 400 |
| Tools | 600 | 400 | 400 |
| Miscellaneous | (9,000) | (10,000) | (4,100) |



Contract Costs (4403)

Development

Contracted Maintenance
Expenditures

| | <u>FY78</u> | <u>FY79</u> | <u>FY80</u> |
|----------------|-------------|-------------|-------------|
| D Street | \$41,500 | \$33,400 | \$91,000 |
| Franklin Field | 60,200 | 29,500 | 49,000 |
| Mission Hill | 97,500 | 120,600 | 88,800 |

Type of Contract

FY80 Expenditures for

| | <u>D Street</u> | <u>Franklin Field</u> | <u>Mission Hill</u> |
|--------------------------|-----------------|---------------------------|-------------------------|
| Elevators | \$ 200 | \$ 100 | \$ 200 |
| Boilers, Heating | 11,100 | 2,000 | 11,000 |
| Exterminators | 24,900 | 10,400 | 11,700 |
| Rubbish Disposal | 17,900 | 32,600 | 37,200 |
| Roof Repairs | 800 | 0 | 19,600 |
| Equipment Rental | 2,200 | 300 | 1,900 |
| Alarm Systems | 700 | 100 | 200 |
| Vehicle Repairs & Maint. | 3,000 | 1,600 | 2,300 |
| Maintenance travel | 2,600 | 800 | 1,500 |
| Electrical Repairs | 25,500 | 0 | 0 |
| Other | 2,100 | 1,100 | 3,400 |



PROTECTIVE SERVICES

Materials and Supplies (4502)

| <u>Development</u> | <u>Expenditures for Protective Services Materials and Supplies</u> | | |
|--------------------|--|-------------|-------------|
| | <u>FY78</u> | <u>FY79</u> | <u>FY80</u> |
| D Street | \$ 21 | \$ 111 | \$ 306 |
| Franklin Field | 11 | 60 | 167 |
| Mission Hill | 20 | 109 | 302 |

Contract Costs (4503)

| <u>Development</u> | <u>Expenditures for Contracted Protective Services</u> | | |
|--------------------|--|-------------|-------------|
| | <u>FY78</u> | <u>FY79</u> | <u>FY80</u> |
| D Street | \$300 | \$3,600 | \$24,600 |
| Franklin Field | 800 | 500 | 75,200 |
| Mission Hill | 3,700 | 1,700 | 16,200 |



PROJECT-BASED BUDGET REQUEST
FOR FY81

Project Name _____

UMA _____

| | | <u>Total</u> | <u>PUM</u> |
|--|--|--------------|------------|
| I. <u>INCOME</u> | | | |
| | Rental Income | _____ | _____ |
| | Accounts Receivable Charges or Credits | _____ | _____ |
| | Total Income | _____ | _____ |
| II. <u>ROUTINE OPERATING EXPENDITURES</u> | | | |
| ADMINISTRATION: | | | |
| 4101 | Salaries | _____ | _____ |
| 4102 | Other Expenses | _____ | _____ |
| | TOTAL ADMINISTRATION OPERATING EXPENSE | _____ | _____ |
| TENANT SERVICES: | | | |
| 4201 | Salaries | 0 | 0 |
| 4202 | Recreation, Other Services | _____ | _____ |
| 4203 | Contract Costs, Training, Other | _____ | _____ |
| | TOTAL TENANT SERVICES EXPENSE | _____ | _____ |
| UTILITIES: | | | |
| 4310 | Water | _____ | _____ |
| 4320 | Electricity | _____ | _____ |
| 4330 | Gas | _____ | _____ |
| 4340 | Heating Fuel | _____ | _____ |
| 4350 | Heating Labor | _____ | _____ |
| 4390 | Other (Sewer) | _____ | _____ |
| | TOTAL UTILITIES EXPENSE | _____ | _____ |
| ORDINARY MAINTENANCE & OPERATION: | | | |
| 4401 | Labor | _____ | _____ |
| 4402 | Materials & Supplies | _____ | _____ |
| 4403 | Contract Costs | _____ | _____ |
| | TOTAL ORDINARY MAINTENANCE & OPERATION | _____ | _____ |
| PROTECTIVE SERVICES: | | | |
| 4501 | Labor | 0 | 0 |
| 4502 | Material & Supplies | _____ | _____ |
| 4503 | Contract Costs | _____ | _____ |
| | TOTAL PROTECTIVE SERVICES | _____ | _____ |
| GENERAL EXPENSE: | | | |
| 4711 | Insurance | _____ | _____ |
| 4715 | Employee Benefit Contribution | _____ | _____ |
| 4740 | Payment in Lieu of Taxes | _____ | _____ |
| | TOTAL GENERAL EXPENSES | _____ | _____ |
| | TOTAL PROJECT-BASED OPERATING EXPENDITURES | _____ | _____ |
| | CENTRAL OFFICE PRO-RATION | _____ | _____ |
| | TOTAL OPERATING EXPENDITURES | _____ | _____ |
| III. <u>NON-ROUTINE EXPENDITURES</u> | | | |
| | | _____ | _____ |

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